Exact Globe & Exact Globe+

User Guide

HRM

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Exact Globe & Exact Globe+

CONTENTS

WELCOME TO EXACT GLOBE NEXT AND EXACT GLOBE+!

This manual provides the information you need to work effectively with Exact Globe Next and Exact Globe+. It is part of the series of user manuals for Exact Globe Next and Exact Globe+. The goal of this documentation is to help you to get quickly acquainted with the product and the possibilities it offers. It will help all users, especially those without much experience with our software, to get started with and benefit from the product straightaway.

Exact Globe Next and Exact Globe+ is an integrated software solution; its modules of related business processes function together in an integrated manner. Besides the user manuals, there are several information sources, related to the software, available to you. You can access online help documents on Exact Globe Next and Exact Globe+ functionalities while working with the software by just pressing the F1 key. The list of help document also contains release notes related to the product. They inform you of the improvements and functional additions in the various releases of the product.

You can also access the help documents, release notes, and other related documents online through the Exact Customer Portal on www.exact.com. The Customer Portal is a protected part of the Exact Software internet site, which has been specially developed to provide you with information and to help you get the maximum yield from your software. This portal informs you about our contacts, downloads, FAQs, and the latest product news. We invite you to use the portal as often as you wish!

Thank you for using Exact Globe Next and Exact Globe+ and this user manual!

> **Note:**
> This user manual contains information applicable to both Exact Globe and Exact Globe+. However, the screens displayed are Exact Globe screens.

1. INTRODUCTION

The Human Resource (HR) department is an integral part of every organization. It manages the employees' information and takes care of their welfare while they are employed by the organization. Apart from that, it also manages employee leave and processes any internal purchase requisitions. The HR department may also manage access levels of employees to different types of information. For instance, only managers are allowed to access managerial reports. Without a standardized approach in accessing information and managing that information, an organization will lose its efficiency.

The **HR** module of Exact Globe Next and Exact Globe+ assists users in managing the tasks of a typical HR department efficiently. It allows you to manage human resource functions from a single screen. For instance, from an employee card, you can obtain the employee's data such as the birth date, home address and personal skills. You can also access the employee's leave records to find out the leave pattern throughout the year or to find out how many days of leave the employee has accumulated so far.

The advantages of the **HR** module are:

Manage employee data easily

The data of each employee can be retrieved and edited easily. All related data is presented in a single screen. Other types of data such as birth dates, anniversaries and years of service also can be recorded and retrieved.

Able to handle employee purchase requisitions

The HR module allows you to record internal purchase requisitions that may arise. Frequently, in an organization, employees request for items, such as stationery, furniture, and computers to improve their working environment. Instead of recording these as purchases and affect your organization's stock purchasing records that are meant for resell, you can record them in this module.

Manage employee leave easily

Using this module, you can easily manage the leave of your organization's employees. It can be used to set the amount of leave allowed for each employee group. It can also be used to record leave that the employee took. With the information, it is also able to produce a report on the availability of leave for each employee.

Assign access levels to each individual employee

Each organization has to manage information that has different levels of security. Some employees are allowed access to some information while others are not such as salary levels and management reports. This module allows you to set security levels for each employee to determine the type of information that each employee can access and modify.

2. SETTING UP

Settings for the company are necessary for storing its general data and defining the behavior of the software. These settings are part of the setup process. This chapter will discuss the settings relevant to the human resource management processes. The following topics are relevant to this module:

- Creating and maintaining hour items
- System settings
- Master Resource Schedule (MRS)
- Authorization settings for HR changes
- Absence entitlements

2.1 CREATING AND MAINTAINING HOUR ITEMS

Before using the **HR** module, you have to first define the hour items. Hour items are work hours you have defined to record the number of hours utilized or realized for performing work. Hour items are used for the purpose of appropriating employee-hour cost.

To create hour items:

1. Go to HR → Planning → Hours, and then click **New**.
2. Under the **Basics** tab, at **Hour code** and **Description**, type a unique code and description for the new hour item. These are mandatory.

3. At **Type**, select **Labor hour** or **Machine hour**. Labor hour is the total hours consumed by the employees to perform the assigned tasks based on the planned work schedules. Machine hour is the total hours consumed by the machine based on the planned operation schedules.
4. Select one of the following options at **Status** based to define the status of the hour item:
- **Active** — The item is currently in use and can be purchased, sold, processed, produced, received, or sent. This is the default option.
- **Blocked** — The item is temporarily blocked from use in operations but still appears in production overviews and budgets.
- **Discontinued** — The item is no longer in use, purchased, sold, or produced.
- **Inactive** — The item is currently not in use and cannot be purchased, sold, or produced.
- **Future** — The item will be used in the future.
5. At **From**, type or select the start date which the hour item is valid. Type the end date at **to** only if there is an end date for the validity of the hour item. If you intend to keep the hour item active for as long as you want, do not fill in the end date.
6. In the **Sales** section at **Sales unit**, type or select a sales unit. This is mandatory. If you do not have a sales unit, click **New** to create a sales unit. You can type the sales price for the hour item defined under the **Price** column below the **Price lists** field. However, you must first save the newly-created hour item before you can type any sales price under the **Price** column.
7. Under the **Financial** tab, type or select the appropriate general ledger accounts for **Revenue**, **Salary payment**, and **Realizations**. These are mandatory. Revenue is the amount earned from the services provided to the customers. This revenue account is being used to create the financial entries when the labor hours are processed for billing. For example, consultancy fee. It depends on the option selected at **Revenue account** in the **Print** section at System → General → Settings, under **Invoice settings**. With **Item** selected at that field, the revenue account defined at **Revenue** under the **Financial** tab at HR → Planning → Hours will be taken instead of the debtor account. Salary payment is the expenses account where the wages are paid to the employees for the services contributed to the organization. Realizations define the cost account used to register the selected hour item during the realization.
8. Go to the **People** tab to maintain the employees linked to the hour item. Click ✚ **Add** to assign an employee for the hour item, ⬌ **Add : All** to add all the active employees to the hour item, ✐ **Edit** to edit the details of the hour item linked to the selected employee, 🗑 **Delete** to delete the selected person, and 🪪 **Person Card** to view the card of the selected employee. When the cost price under the **Basics** tab is filled, it will automatically be copied to the price of the hour item linked to the employee(s). For more details on creating hour items, see *Chapter 1.2 Creating Labor Hours* in the **Projects** user manual.
9. Click **Save** to save the changes.

> **Tip**:
> The **Created by** field shows the person who created the hour item and it cannot be edited.

To edit hour items:

1. Go to HR → Planning → Hours.
2. Select the hour item that you want to edit, and then click **Open**.
3. Make the necessary changes. The **Hour code** field is not enabled.
4. Click **Save**, and then **Close** to exit.
5. Click **Recode** if you want to modify the item code of the selected hour item. The message "This process may take some time. Continue?" will be displayed. Click **Yes**, and then type the new item code at **New**. Click **Recode** to change the item code or **Cancel** to close without making any changes.

To delete hour items:

6. Go to HR → Planning → Hours.
7. Select the unwanted hour item, and then click **Delete** to remove it. However, hour items that are linked to any entry or record cannot be deleted.
8. Click **Yes** to accept the deletion.

2.2 PAYROLL SETTINGS

System settings affect the overall operation of Exact Globe Next and Exact Globe+. These settings determine each module's features and how data are processed and displayed. You can define the payroll settings at System → General → Settings, under **Payroll settings**.

For this section, only the **Payroll year** and **HR** sections are described. You will see the screen as follows:

Payroll year section

Default

Payroll year is the fiscal year where all the payroll entries are processed and generated for all employees. At **Default**, type a fiscal year to set it as the default financial year for processing the payroll.

Highest

Type a fiscal year as the highest payroll year in order to proceed with payroll entries. Click 📁 **Open: payroll year** to generate the next payroll year after the fiscal year defined at **Highest**.

Lowest

Type a fiscal year as the payroll year you start the payroll administration.

HR section

Log: Effective date

This keeps track of the dates where the changes in employees' details have taken place. Select this check box to display the **Log: Effective date** screen to update the effective date of which the details in the personal card are changed. For more information on personal cards, see *Chapter 3.1 Creating and Maintaining Entries for People*.

After you are done, click **Save** to save the changes. However, before you can save the changes, you will see the **Log: Effective date** screen with the modified field name(s), old value(s) as well as new value(s), effective date, and the person who modified the field(s). In the **Log: Effective date** screen, to ensure accuracy, click **Save** to accept the changes made to the field(s) and effective date. Then, click **Close** to exit. By default, the value of the effective date is the current date. You can edit the effective date if required.

Update: FTE

Update: FTE indicates if the full-time or part-time employment type of the employee is updated automatically after each process of modifying the employee's work schedules. Select this check box to display the updated FTE information in the personal card each time you change the work schedules of the employee. You can still manually edit the FTE value if required, but the updated value will take effect after the background job is executed. For more details, see *Chapter 3.1 Creating and Maintaining Entries for People* at **FTE** under **Contract**.

2.3   ITEM DATA SETTINGS

This is where you define item data settings for the HR schedules, namely working days and public holidays. For this section, only **Working day** and **Public holiday** are described. The settings here are used to generate the Master Resource Schedule (MRS) records for all employees. By default, if the employee does not have any person-specific work schedules defined earlier, the company schedules defined at System → General → Countries → Schedule will be used for generating the MRS based on the item settings here. Go to System → General → Settings, and then click **Item data settings** on the left. You will see the screen as follows:

Person: Planning section

Working day

Type or select the working day.

Public holiday

Type or select the public holiday code. By default, Exact Globe Next/Exact Globe+ provides a pre-defined hour item, which is **Working day on Public Holiday (WPH)** with day as the unit.

2.4   SETTING UP WORK SCHEDULES

This is to set up the work schedules for the employees in the organization, which include the days and work hours. Go to System → General → Countries → Schedule to define the default work schedules. You can create and maintain the individual employee schedules by clicking **Schedule** at HR → People → Maintain.

Hours per day

Type the total work hours for all employees in a day. By default, it is eight hours excluding the lunch break. The lunch break duration is determined by the company's policy. This is mandatory.

Monday - Sunday

Type the number of work hours for each work day of the week from Monday to Sunday, depending on the company's policy.

Total hours

The total hours in a week is an automatic calculation of the total work hours multiplied by the number of work days in a week. This cannot be edited.

2.5 SETTING UP PUBLIC HOLIDAYS

Every country has different public holiday entitlements. You can define the days which are gazetted as public holidays according to your country or location at System → General → Countries → Public holidays.
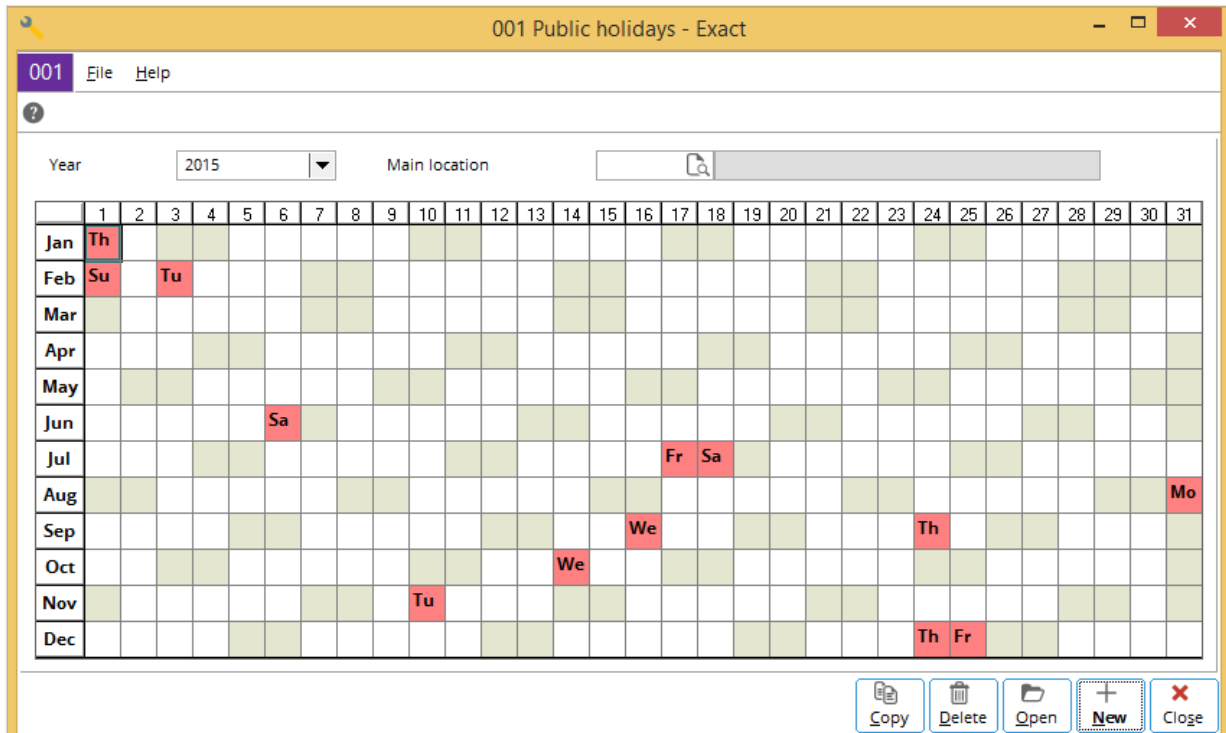
Year

Select a fiscal year for which you want to define the public holidays.

Main location

Type or select the location for the public holidays. After you have saved the public holiday created, you cannot edit the main location. The columns in light purple indicate the public holidays for the selected location only while those columns in red indicate the public holidays for the selected country. You may need to create a location at HR → People → Maintain if you have not already done so.

Select an existing employee and click **Open**. At **Main location** in the **Employment** section, click 🔍, and then click **New** to create a location. The main location assigned in the personal card for each respective employee will be linked to the main location defined when you create public holidays. If you do not assign any location at **Main location** when creating a public holiday, the public holiday will be identified as country-specific instead of location-specific.

Click the required date box of the public holiday, and then click **New**. Alternatively, you can double-click the required date box to do this. The selected date is then displayed. However, you can still type or select a different date here. Next, type a description of the public holiday. Then, type or select the location for the defined public holiday. When you have already defined your public holiday, you will be able to see a tooltip displaying the description of the public holiday when you point over the particular date box.

2.6 CREATING ABSENCE TYPES

Every employee in an organization is entitled to annual leave, special leave, medical leave, and other entitlements. Before creating an absence type, you must first define the hour items. For more details, see *Chapter 2.1 Creating and Maintaining Hour Items*.

You can create the absence types at System → HR & Security → Absence types, and then click **New**.

ID

This is a system-generated ID for the absence type. You can edit the absence type ID. After you have saved the absence type, the ID can only be recoded or renumbered, but not edited.

Absence type

Type or select the hour item of the absence type. Absence type is the type of leave taken by the employee to be away from the office. For example, you can define the hour item of vacation leave, sick leave, or maternity leave for the employee. For more details on creating and maintaining hour items, see *Chapter 2.1 Creating and Maintaining Hour Items*.

Assortment

Type or select an assortment. An assortment is an item group given to a product item.

Color

Click ✔ **Select** to assign a color to be associated with the absence type. When ✔ **Select** is clicked, select the appropriate color and click **OK** to confirm. The colored box will be visible in the absence card of the employees.

Duration in days

Select this check box to indicate that the absence type is measured in days instead of hours. By default, this check box is selected.

Automatic approve

Select this check box to automatically approve the new absence request created. If you do not select this check box, you have to manually approve it by clicking **Approve** after you have created an absence request. For more information on creating and maintaining absence requests, see *Chapter 3.4.2 Creating and maintaining absence requests*. Alternatively, you can go to HR → Entries → Approve absences, select the required absence request which is in the open status, and then click **Approve** to approve it.

Costs: Payroll component

Select this check box to calculate the absence cost based on the last base salary. This check box is enabled only if **Yearly** is not selected at **Buildup of real entitlement** in the **Entitlement** section. By default, this check box is not selected.

> **Note**:
> The **Costs: Payroll component** check box is enabled only if you have **SE1703 E-Payroll** in your license.

Entitlement section

Buildup of real entitlement

Select **None**, **Monthly**, or **Yearly** to determine the frequency of calculation and accumulation of allowed entitlement. By default, the **None** is selected, which indicates that there is no entitlement to be assigned. You can select **Monthly** or **Yearly** to calculate the entitlement for every month or year respectively. For example, you can define **Monthly** for the absence type of vacation leave, which is generated every month and it breaks down the entitlements for each month. For the option of **Yearly**, it is applicable for the absence type of sick leave which is generated only once per year and there is no breakdown of entitlement for each month.

Basis

Select **Fixed**, **Service year**, **Age**, or leave the field blank to determine the basis of the entitlement. This field is enabled and mandatory only when you select **Monthly** or **Yearly** at **Buildup of real entitlement**. By default, the value is blank. Basis is the method of which the absence entitlements are calculated according to the following options:

- **Fixed** — This option calculates the entitlement based on the fixed number of days defined for the employees.

- **Service year** — This option calculates the entitlement based on the entitlement defined in the range of the employee's years of service in the organization. You can define the respective entitlements for different years of service before you generate the absence entitlements for the employees at HR → Reports → Absence balance list. From here, click **Display** to list all the absence entitlements for the employees. In the **Balance list** screen, click **Entitlement**. In the Entitlement screen, select an absence type which has a basis of **Service year**, and then click **Open** to modify the entitlement of the selected absence type for all employees. Type the year(s) of service and total number of days for the entitlement at **Years** and **Days** respectively. Click ✚ **Add** to add a new entitlement entry line or 🗑 **Delete** to remove the selected entitlement entry line from the columns. Click **Save** to save the changes, and then click **Close** to exit.

- **Age** — This option calculates the entitlement based on the age range of the employees. You can define the respective entitlements for different age groups before you generate the absence entitlements for the employees at HR → Reports → Absence balance list. From here, click **Display** to list all the absence entitlements for the employees. In the **Balance list** screen, click **Entitlement**. In the Entitlement screen, select an absence type which has a basis of **Age**, and then click **Open** to modify the entitlement of the selected absence type for all employees. Type the year(s) of service and total number of days for the entitlement in **Age** and **Days** respectively. Click ✚ **Add** to add a new entitlement entry line or 🗑 **Delete** to remove the selected entitlement entry line from the columns. Click **Save** to save the changes, and then click **Close** to exit.

Increment factor

Select **Calendar year**, **Anniversary**, or leave the field blank to determine the increment factor method. This is the basis for increasing or adding the entitlement. This field is enabled only when you select **Service year** or **Age** at **Basis**. When you select **Fixed** at **Basis**, the value displayed at **Increment factor** is **Calendar year** and it is disabled for editing. By default, the value is blank.

Calendar year is used when the increment factor method calculates the increasing entitlements starting from January of the next fiscal year. You can select **Anniversary** when you want the increment factor method to calculate the increasing entitlements starting from the month which makes up a full-year of service after the month the employee starts the employment. For example, the new absence entitlement for an employee is changed from seven days to 14 after two years of service in the company. The employee started employment in July 2010 and the change was approved in August 2012. If **Calendar year** is selected, the entitlement is calculated starting from January 2013. When **Anniversary** is used as the increment factor, the increasing entitlement is effective from June 2013 instead of January 2013.

Field section

In this section, you can select and add the fields to be displayed when you create an absence request. For more details, see *Chapter 3.4.2 Creating and maintaining absence requests*.

You can also modify or delete the fields. The available sections and fields differ depending on the fields you select under the **Name** column.

Person

This displays the information of the person for the selected absence type. It is available for you to select when you create an absence request. For more information on creating and maintaining absence requests, see *Chapter 3.4.2 Creating and maintaining absence requests*. The default value is **Current**.

Reason

This displays the reason of absenteeism for the selected absence type. It is available for you to select when you create an absence request. For more information on creating and maintaining absence requests, see *Chapter 3.4.2 Creating and maintaining absence requests*.

Start date

This displays the start date of the selected absence type. It is available for you to select when you create an absence request. For more information on creating and maintaining absence requests, see *Chapter 3.4.2 Creating and maintaining absence requests*.

End date

This displays the end date of the selected absence type. It is available for you to select when you create an absence request. For more information on creating and maintaining absence requests, see *Chapter 3.4.2 Creating and maintaining absence requests*.

Duration

This displays the duration of absenteeism for the selected absence type. It is available for you to select when you create an absence request. For more information on creating and maintaining absence requests, see *Chapter 3.4.2 Creating and maintaining absence requests*.

Notes

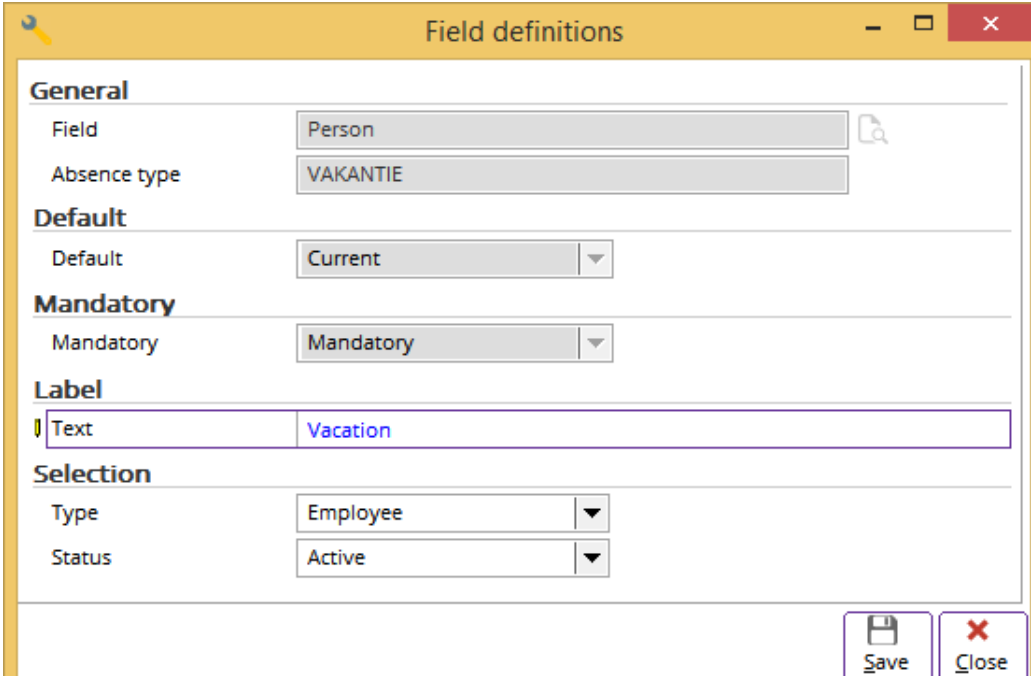This displays the notes of absenteeism for the selected absence type.

$+$ **Add**

Click this to add a field to the **Name** column.

🖉 **Edit**

Click this to modify the selected field under the **Name** column. You will see the following screen:

General section

Field

This displays the description of the selected field.

Absence type

This displays the absence type of the selected field.

Use: Schedule

Select one of the following options to define the schedule to be used for the absence type. It is available and can be edited only for the **Duration** field and also if there is no absence request that was created previously for a particular absence type. It cannot be edited if you have created an absence request linking to the selected schedule type. The default option is **Company**.

- **Company** — This option indicates that the system will generate the absence entitlements of the selected absence type based on the corporate-level work schedules defined at System → General → Countries → Schedule.

- **Person** — This option indicates that the system will generate the absence entitlements of the selected absence type based on the person-specific work schedules defined for particular employees.

- **Average** — This option indicates that the system will generate the absence entitlements of the selected absence type based on the total working hours for the employee multiplied by the total number of absence hours divided by the total number of working days in a week. For example, the employee worked one full- day of eight hours, four hours on the following three days, and did not work on Friday. The total number of working days in a week is four days. In this case, the absence entitlements should be based on the average schedule results obtained of five hours as shown in the following calculations:

  Total working hours in a week = (1 x 8) + (3 x 4) = 20 hours

  Total number of working days in a week = 4 days

  Average full working day for the employee = 20 hours / 4 days = 5 hours

  Total number of absence hours = 4 hours

  Hence, the absence day per average employee schedule = 4-hour of absences / 5 hours = 0.8 day

Default section

Default

Select one of the following options to define the default value of the field. It is unavailable for **Our ref**. and **Your ref**. fields. The layouts of the **Default** field vary depending on the fields you select in the **Field** section. In some cases depending on your selection in other fields, you have to type the values in the box at **Default**.

- **Blank** — The default value of **Person**, **Start date**, and **End date** are left blank when you create an absence request.

- **Current** — This displays the current employee at **Person** while the **Start date** and **End date** display the system date during the creation of an absence request.

Mandatory section

Mandatory

Select **Mandatory** or **Optional** to indicate if the selected field is mandatory. In some cases, depending on your selection in other fields, the default value is predefined and it cannot be edited.

Calculation section

Select the **Manual entry** check box if you want to calculate the absence duration manually. This section is available only for the **Duration** field. If you select the **Manual** entry check box, you can enter the absence request up to 24 hours per day regardless of the generated MRS hours. In this case, the absence entries are not measured based on the MRS hours.

When this check box is cleared, you can enter the absence entries based on the generated MRS hours. The maximum absence hours you can enter in the absence entries are always measured in the generated MRS hours.

Label section

Text

Type a label for the selected field. If you leave it blank, its default value is the original label. It is unavailable for the **Start time** and **End time** fields in the **Fields** section in the **Absence types** screen.

Selection section

This section is available only for the **Person** field.

Type

Select **Employee** or **All** to define the employment type.

Status

Select **Active**, **Active + Hired**, or **All** to define the employment status.

🗑 **Delete**

Click this to delete the selected field from the **Name** column.

Planning section

Out of office

Select this check box to link the out-of-office status to the employee who is physically not in the office or not working on the particular planned working day. This is applicable only when you have integrated Exact Globe Next/Exact Globe+ with Exact Synergy Enterprise. When the employee is not available, you will see the **Out of office** icon next to the person's name in Exact Synergy Enterprise.

Calendar

Select this check box if you want the absence request(s) that is entered in Exact Globe Next/Exact Globe+ to be visible in Exact Synergy Enterprise. This is applicable only when you have integrated Exact Globe Next/Exact Globe+ with Exact Synergy Enterprise.

2.7   CREATING SECURITY ROLES

Security roles are created to ensure data security by hiding sensitive information or restricting access of employees according to the defined security levels. Firstly, you need to assign at least one employee to the role of **ADMINISTRATOR** before creating and assigning other roles to the rest of the users. An administrator determines and grants different security levels to all employees in the organization based on the employment type. Only administrators can create security roles for the employees.

Some roles have been predefined by the system. You cannot delete system-generated roles but you are able to modify them.

Caution:
The only role you should not modify or delete is the role of **ADMINISTRATOR**. Deleting the **ADMINISTRATOR** role will not allow you to create or assign other roles to different employees. Without this role, all the administrative functions in Exact Globe Next/Exact Globe+ will be disabled.

To define system administrators:

1. Go to System → HR & Security → Security roles → Maintain, or HR → People → Security roles → Maintain.
2. Select ADMINISTRATOR.
3. Click ➕ **Add** in the **Users** section to assign an employee to that role.
4. In the **Roles** screen, select the person. If you want to assign the role to more than one person, hold down the CTRL key and click the relevant employees. Click **OK**. Alternatively, you can click **Select all** for all employees.
5. Click **Clear** to clear all the selected employees, or **Close** to exit.
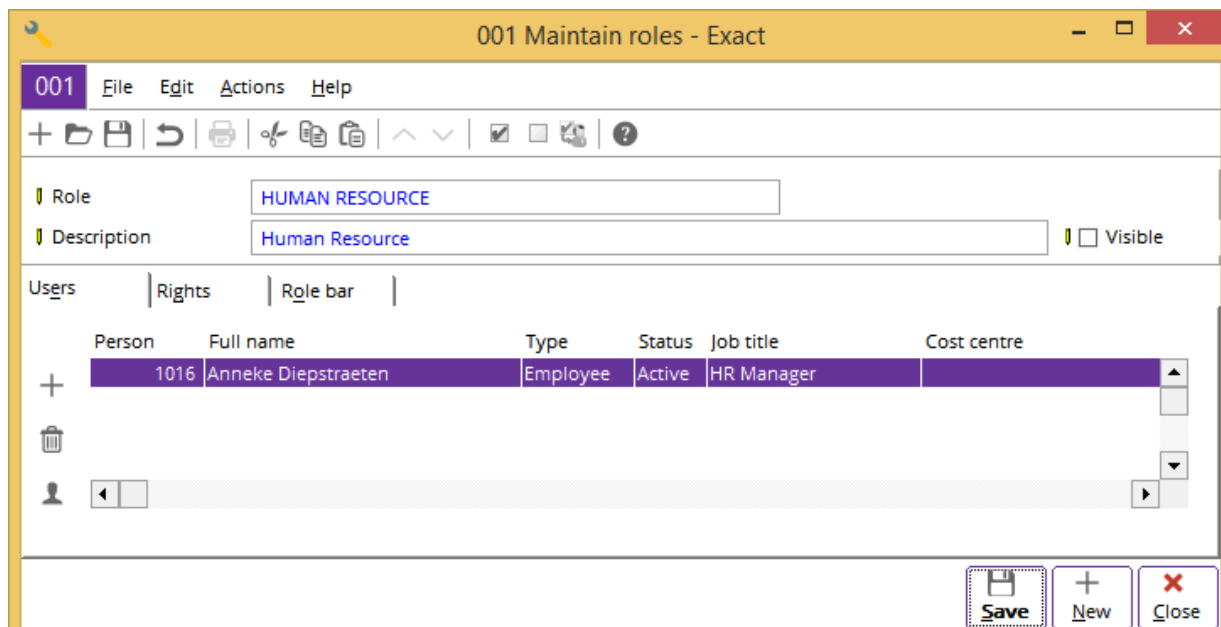
To create security roles:

1. Go to System → HR & Security → Security roles → Maintain, or HR → People → Security roles → Maintain.
2. Click **New**.
3. At **Role** and **Description**, type the name and description of the new role. These are mandatory.
4. Select the **Visible** check box if you want to enable the role in the **Roles** screen. The **Roles** screen is found at HR → People → Maintain, click **Open** at any selected employee entry or create an entry for employee, then go to the **Rights** tab. Next, click ✚**New** next the **Rights** section and the **Roles** screen will be displayed. If you have selected the **Visible** check box earlier on, the role will be displayed here.
5. Under the **Users** tab, click ✚ **Add**, and then select the employee to assign the employee to the new security role. The details of the employee, such as the employee ID, full name, employment type, employment status, job title, and cost center will be displayed. If you want to assign the role to more than one employee, hold down CTRL and click the relevant employees. Then, click **OK**. Alternatively, you can click **Select all**. To clear all the selected employees, click **Clear**. If you want to remove a previously selected employee from this role, select the employee, and then click 🗑 **Delete**. If you click 👤 **Person**, you will be able to view the personal card of the selected employee.
6. To define the rights for this new security role, click the **Rights** tab.
7. Click ⊞ to expand the **Menu** and **Functions** views respectively.
8. At **Menu**, select the required check box(es) to assign the rights from the selected module to the role. A list of relevant submenus will be displayed on the right. Select the submenu check box(es) to assign further rights to the role. Clear the check box(es) if you do not wish to assign the rights to this role. This gives the employees the access to various menu paths within Exact Globe Next/Exact Globe+. If a person does not have the rights to a particular module, he or she is unable to access it.
9. At **Functions**, select the function check box(es) to assign the rights associated with the selected function to the role. For example, to assign a user right in the **HR** module, click the **HR** check box. You can see a list of subfunctions on the right pane. Clear all the check boxes except the **To maintain person's reference number** check box on the right pane to allow only the defined function linking to the selected role. When an employee is assigned this **HR** role, he or she can only maintain the reference numbers of the employee, but not other HR functions.
10. To assign the security role to different groups, click the **Role bar** tab.
11. Click ⊞ to expand the modules under **Menu**. For example, click ⊞ at **HR** and select **Entries**. Now, select **Absence** on the right.
12. In the **Role bar** section on the right, click ✚ **Add group** to add a new group to create a menu shortcut for easier access to the required menu path. Select the required sub-menu (for example, **Absence**), and then click ＞ . You may select and add more than one submenu at a time.

Alternatively, you can click >> to add all the submenus to the **Role bar** section. Click 🗑 **Remove group** to delete an unwanted role group.

13. Click **Save**.
14. Click **Close** to exit.

> **Tip**:
> You must first select at least a menu under the **Rights** tab to activate or enable the menu under the **Menu** section at the **Role bar** tab. When you select a menu under the **Rights** tab, some of the check box(es) of other menus will be automatically selected. This means the selected menu is linked to some of the functions in other menus.

To manipulate the newly-created role group or menu shortcut, you can go to the main menu, and then click ▲ at the status bar at the bottom of the screen. By default, you will see **Default role**. If you have created a role group, you will see at least two roles after clicking ▲ . Select the required role group and the **General** role bar on the left of the main menu will be changed to the selected role group with the previously selected sub-menus.

You can also edit the information on a role at HR → People → Security roles → Maintain. Select a role, and then click **Open**. Fill in the new information, click **Save**, and then **Close**. If you want to delete a role, select the role, and then click **Delete**. A confirmation message will be displayed. Click **Yes** to delete the role.

2.8   CREATING USER RIGHTS

User rights are the permission granted to the respective employees to create, view, and manage the entries in the menu. Without it, a user will not be able to access certain menu or functions in Exact Globe Next/Exact Globe+. Therefore, it is important that user rights are defined while setting up the
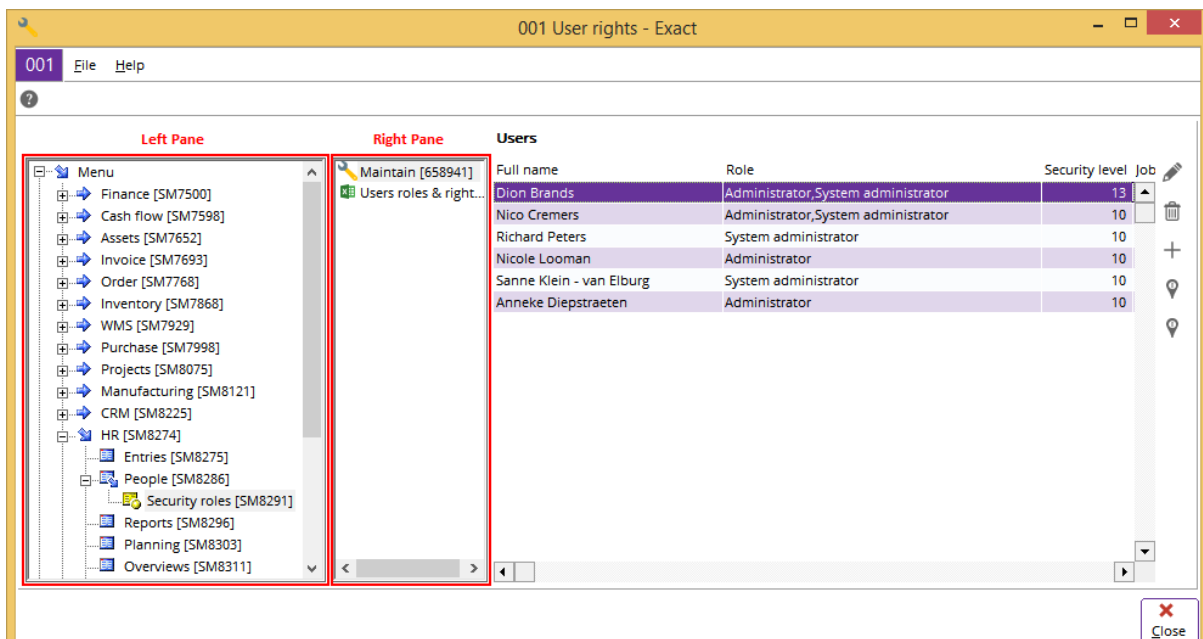
software.

To create user rights:

1. Go to System → HR & Security → User rights, or HR → People → User rights.
2. Click ⊞ to expand the **Menu** view located on the left. For example, to create a user right in the **HR** module, click ⊞ at **HR**, and then select **People** in the left pane. Next, select **Maintain** in the middle pane to display the employees list in the **Users** section. You can see the full name and assigned role of the employees respectively.

3. Select an employee and click ✛ **Add** to assign the selected role to the employee(s), and then click **OK**. Alternatively, you can click **Select all**. Click **Clear** to clear all the selected employees or **Close** to exit. Click 🖊 **Edit** to modify the role of the selected employee or 🗑 **Delete** to delete the employee from an assigned role. If the selected employee has more than one role, you will be prompted to select the required default role, and then click **OK** before assigning a new employee to the role, modify, or delete an employee in the **Users** section.

4. Select an employee and click 📍 **Warehouse** to allow the employee access rights to the selected warehouse. The **Warehouse** screen will be displayed. Click ✛ **New** to allow the employee to access the selected warehouse, or 🗑 **Delete** to remove the assigned warehouse rights. You can also manage the access rights of the employee for specific cash instruments by clicking 📍 **Cash instrument**. Click ✛ **New** to allow the employee to access the cash instrument, or 🗑 **Delete** to remove the assigned cash instrument rights.

5. Click ⊞⋯ to expand the **Functions** view located on the left. For example, to assign a role or function in the **HR** module, click ⊞⋯ at **Rights**, and then **HR** on the left pane. You can see a list of subfunctions on the middle pane. Next, select **To maintain person's reference number** on the middle pane to display the list of employees in the **Users** section. You can see the full name and assigned role of the employees respectively. This allows only the defined function to be linked to the selected role. For the employees listed in the **Users** section who are assigned this **HR** role, they can only maintain the reference numbers of the employee, but not other **HR** functions.

6. Click **Close** to exit.

2.9 MASTER RESOURCE SCHEDULE (MRS)

You can manage and generate the working schedules of the employees at HR → Planning → MRS. This function provides information on the Master Resource Schedule (MRS) records for the selected employee. An MRS is the planned work schedules indicating the capacity for all employees in the organization. It determines the working hours the employees start and finish work for each day. You can also add, delete, and copy MRS records of the employee. Before you can generate the MRS, you must first define the working schedules of each employee in the organization. For more details on working schedules, see *Chapter 2.4 Setting up Work Schedules*.

2.9.1 Generating and maintaining MRS
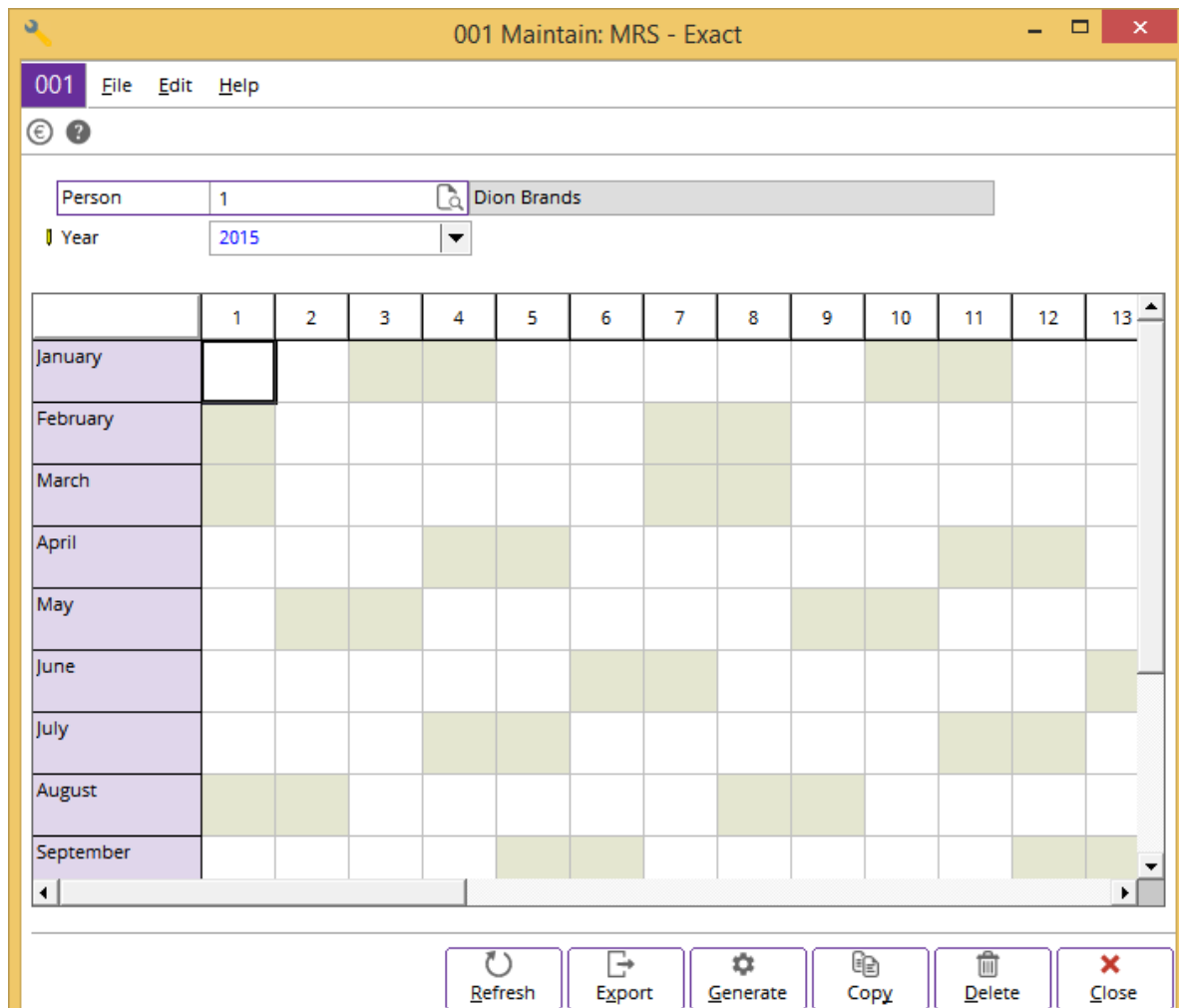
To generate MRS:

1. Go to HR → Planning → MRS. Alternatively, you can go to HR → People → Maintain, and then click **Generate**.
2. Before generating the MRS, you must first define the schedules. For more information, see *Chapter 2.4 Setting Up Work Schedules*.
3. Select the **Person** and **Year** for the MRS. The MRS will be generated for the selected person only.
4. Click **Generate** to generate the MRS. The **Maintain: MRS** screen will be displayed.
5. At **Date** and **to**, type or select the range of dates.
6. Click **Refresh**, and then click **Generate**.
7. Click **Close** to exit.
8. In the **Maintain: MRS** screen, click **Refresh** to view the updated schedules.

To duplicate MRS:

1. Go to HR → Planning → MRS.
2. Click on a box to define the date, and then click **Copy**. The **Maintain: MRS** screen will be displayed.
3. Type or select the range of dates at **Date** and **to**.
4. Type or select an employee at **Person**.
5. Click **Refresh**.
6. At **Copy to**, select **Cost center**, **Job group**, **Main location**, or **Person** as the destination where you want to copy the MRS to. You do this when you want to copy the selected schedules to the same group of employees.
7. Select the date you want to copy. Alternatively, click **Select all** to select all dates.
8. Click **Copy** to copy the selected date(s).

To delete MRS:

1. Go to HR → Planning → MRS.
2. Select the date that you want to delete, and then click **Delete**. The message "Delete the data selected?" will be displayed.
3. Click **Yes** to delete. However, schedules that are linked to any absence requests cannot be deleted.
4. Click **Close** to exit.

Tip:
Alternatively, you can right-click the respective date column(s) to copy or delete the selected MRS record(s). To maintain the MRS hours, double-click a particular date column. In the **Maintain: MRS** screen, click ✛**Add** to add a new row for the additional MRS hours or 🗑 **Delete** to delete the selected row. When done, click **Save** to save the details of the new MRS record or to accept the changes, and then **Close** to exit.

2.10 AUTHORIZATION SETTINGS FOR HR CHANGES

In certain circumstances, authorization is required for changes to be made in the personal card. Before you authorize any changes, you must first select the check box(es) of the field(s) you want to view in the search results at System → HR & Security → Authorise HR changes. Authorization of fields is used mostly for personnel details, payroll data, and payroll components.

To set authorization for changes in HR fields:

1. Select the check box for the selected field to make authorization mandatory whenever any value in the selected field is changed in the personal card. You may select more than one.
2. Click **Save** to save all changes, or click **Close** to exit without saving the changes.

2.11 ABSENCE ENTITLEMENTS

Absence entitlements are the total number of days or hours given to the employees to be away from the office in each year based on the absence types defined. In this section, you can create absence entitlements for all employees based on the previous year's records, or to create entitlements based on the linked absence type and activity cards. You can view the opening balance, absenteeism, and year-end absence balances by generating the entitlements for all employees.

2.11.1 Creating absence entitlements

To assist in the human resource administration, you can select the layout to display the absence overview with the details of the absence balance, days, hours or amount for the absence entries for the employees in the previous and current year.
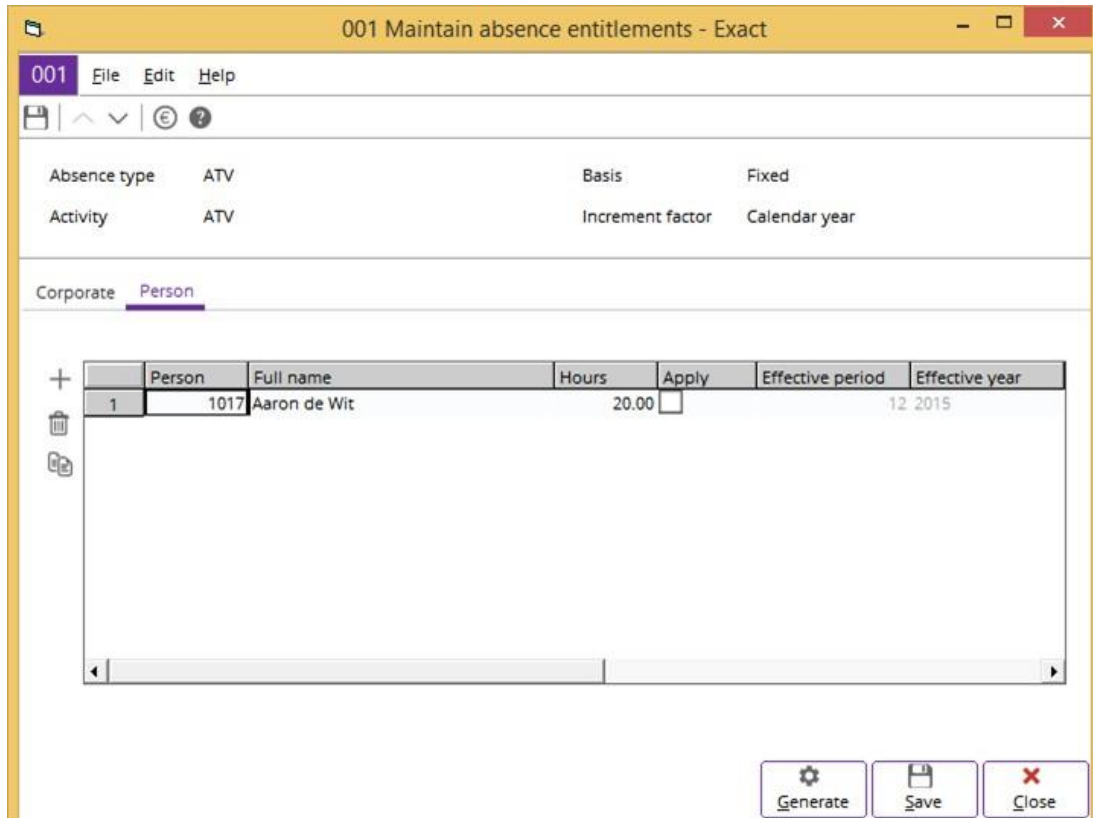
To create absence entitlements:

1. There are several ways of creating absence entitlements, these include:

    - Go to HR → Reports → Absence balance list and type a fiscal year at **Year**. This is mandatory. Define the search criteria, click **Display,** and then click **Entitlement**. Select an absence type, and then click **Open**.
    - Go to System → HR & Security → Absence entitlements, select an absence type, and then click **Open**.
    - Go to System → HR & Security → Absence types, select an absence type, and then click **Open**. Click
    - Entitlement**.**

2. In the **Maintain absence entitlements** screen, click the **Corporate** tab to create absence entitlements for all the employees who are not attached to any employee specific entitlements, or **Person** tab to create absence entitlement for employees.
3. If you have selected the **Corporate** tab, type the number of days of absence entitlement that you want to give the employees in the **Days** box if **Fixed** is selected at **Basis** at System → HR & Security → Absence types in the **Entitlement** section. Otherwise, type the number of years in the **Year** column and number of days in the **Days** column to define the number of years employees will have to be in service before they are entitled to the number of days of absence entitlement. If you have selected the **Person** tab, type the employment ID in the **Person** column, employee's full name in the **Full name** column, and the number of days that you want to give absence entitlement to the employee in the **Days** column. You can also click ＋**Add** to add another employee. In the **Entitlement** section, type the number of years under the **Year** column and number of days under the **Days** column that the selected employees are entitled to the absence entitlements. The **Entitlement** section is available only if **Service year** is selected at **Basis** at System → HR & Security → Absence types in the **Entitlement** section.

4. Click **Save** to save the entitlements.
5. Click **Close** to exit.

2.11.2 Generating opening balance of entitlements

Generating the opening balance of absence entitlements recalculates the yearly opening entitlements that were carried forward from the previous year for all employees. This usually has to be done at the beginning of every fiscal year. Without doing this, the balance of the absence entitlements in the previous year will not be recorded and appended to the new fiscal year. Firstly, you have to create the absence entitlements for the absence type before generating the opening balance of any entitlements. For more information, see *Chapter 2.11.1 Creating absence entitlements*.

To generate opening balance of entitlements:

1. Go to HR → Reports → Absence balance list.
2. Define the relevant criteria and click **Display** to display all the absence entitlements for the employees. The
3. **Balance list** screen will be displayed.
4. Define the relevant criteria, and then click **Refresh**.
5. Click **Generate** to generate the defined absence entitlement. The **Generate absence entitlements** screen will be displayed.
6. Select the required absence type at **Absence type**.
7. At **Year**, type a fiscal year. Define the period, if required.
8. Click **Filter** to show or hide the **Selection** section. Type or select the required cost center and person.
9. Select the **Payroll employee** check box to allow the entitlements to be generated for all payroll employees whose payroll data and payroll components are linked. You can clear this check box to generate the entitlements for all the new and existing employees.

10. Click **Refresh** and the **Copy** screen will be displayed. Four options are available:

- **Entitlement** — This option generates the absence entitlements of the employees for the current fiscal year based on the corporate-level and person-specific entitlements in the displayed results. Corporate- level entitlements are the entitlements defined for all employees that have been assigned the entitlements earlier. Person-specific entitlements are specifically assigned to particular employee(s) only.
- **Previous year** — This option generates the absence entitlements of the employees from the previous year to be treated as the entitlements for the current fiscal year.
- **Entitlement (Actual labor hours)** — This option is available if you have the **E-Payroll** module in your license and the option at **Buildup real entitlement** of this absence type is set as **Monthly**. This option generates the absence entitlements of the employees based on the **Source** setting of the payroll component in the **Calculation** section. This can be done when you create a payroll component at Payroll → Components → Maintain. If none of the **Contract** components is linked to an employee, the absence entitlements will be generated based on the actual labor hours realized by the employees. However, if one of the payroll components where **Source** is **Contract** is linked to an employee, the absence entitlements for the employee will be set to zero and no absence entitlement will be generated. **Period** is enabled when you select this option. If you generate the entitlements for a specific period or month, then you are able to see the breakdown of the respective entitlements for each month. Otherwise, you will only see the total entitlements for the year without the breakdowns for each month. You can do this at HR → Reports → Absence balance list. From here, click **Display** to list all the absence entitlements for the employees. In the **Balance list** screen, select the entitlement under the **Entitled** column, and then click **Zoom** to view the prorated entitlements for each month.
- **Entitlement (Contract Hours)** — This option generates the absence entitlements of the employees based on the payroll component of the option **Contract** linking to the employee at **Source** in the **Calculation** section. This can be done when you create a payroll component at Payroll → Components → Maintain. When there is a **Contract** component linked to an employee, the entitlement will be generated based on the Master Resource Schedule (MRS) hours for the employees. However, if none of the payroll components where **Source** is **Contract** is linked to an employee, the absence entitlements for the employee will be set to zero and no absence entitlement will be generated. **Period** is enabled when you select this. If you generate the entitlements for a specific period or month, then you are able to see the breakdown of the respective entitlements for each month. Otherwise, you will only see the total entitlements for the year without the breakdowns for each month. You can do this at HR → Reports → Absence balance list. From here, click **Display** to list all the absence entitlements for the employees. In the **Balance list** screen, select the entitlement under the **Entitled** column, and then click **Zoom** to view the prorated entitlements for each month.

11. Select **Entitlement**, **Previous year**, **Entitlement (Actual labor hours)**, or **Entitlement (Contract Hours)** and click **OK** to generate the entitlements. By default, **Period** shows the current month. Click **New** to generate an absence entitlement if you do not have one yet.
12. Click **Save** to save the generated entitlements. You will see a message asking for confirmation to overwrite the old value. Click **OK** to confirm it. After saving, every employee will have the same absence entitlements except for those who have been assigned specific entitlements.
13. Click **Close** to exit.

To adjust absence entitlements:

1. Go to HR → Reports → Absence balance list and type a fiscal year at **Year**. This is mandatory.
2. Define the rest of the relevant criteria and click **Display** to list all the absence entitlements for the employees.
3. In the **Balance list** screen, click +/- **Entitlement**.
4. In the **Absence: Adjustment** screen, type or select the absence type, reason of adjusting the entitlement, start date of which the adjustment takes place, and number of days entitled. Select an employee if you want to adjust the person-specific entitlement for the selected absence type.
5. Click **Save** to save the changes.
6. Click **Close** to exit.

Tip:
To view the financial transactions of the generated absence entitlements, go to the relevant general ledger cards at Finance → General ledger → Cards. The general ledger accounts to be selected are defined earlier under the **Financial** tab when creating the hour items for the respective absence types at HR → Planning → Hours. For more information on creating and maintaining hour items, see *Chapter 2.1 Creating and Maintaining Hour Items*. Select the required general ledger account, and then click **Display**. In the **General ledger card** screen, click **Our ref**. to view the financial transactions of the selected general ledger accounts for the generated absence entitlements. The general ledger accounts displayed vary. It depends on the names defined and assigned by the user to each general ledger account when creating and maintaining hour items.

3. HUMAN RESOURCE MANAGEMENT

In daily business operations, it is important to have an organized human resource administration to manage all employees. Every employee should be given different security roles and rights depending on the job title and job level in the organization. The human resource department also manages job postings and new job opportunities for the existing employees and future applicants.

To keep track of the absenteeism of the employees in the organization, Exact Globe Next/Exact Globe+ provides the flexibility and convenience to create and maintain the absence details for each employee, such as the absence types, entitlements, requests, and outstanding absence balance for each year.

Therefore, with an excellent absence management and administration for all employees, you can plan and monitor the employees and absence effectively. Besides, you can also do the capacity planning for the employees, and view the comparison between the actual and planned capacity. From here, you can also have an overview of the planned and actual performance of each employee with the projects and tasks assigned.

3.1 CREATING AND MAINTAINING ENTRIES FOR PEOPLE

This feature enables the storage and maintenance of an employee's personal particulars, such as payroll, reference number, family details, absence records, budgets, vacancies, document attachments, roles and rights, and log records.

3.1.1 Creating general information

To create general information:

1. Go to HR → People → Maintain, or Payroll → People → Maintain.
2. Click **New**.
3. Type the ID, user name, last name (this is mandatory), residential address, personal phone number, job title, start date, manager, cost center, creditor, and security level of the employee.
4. You must type the date of birth at **Place of birth / Date** in order to create payroll information for the employee under the **Payroll** tab. The username is the same as the Microsoft Windows authentication login name, while the user rights are the access rights given to the employee in the organization. See the following **Tip** for the explanation.
5. Click **Save**.
6. Click **Close** to exit.

Tip:
To create and maintain a job title, go to **Job title** under the **Contract** section and then click ⌕ . You will see the **Job titles** screen. Click **New** to create a job title, or click **Open** to modify an existing one. Define the relevant criteria, click **Save**, and then **Close** to exit from the **Job titles** screen. A manager should have a higher security level than the staff-level employees. For example, the security level for the **Finance and Administration Manager** is **15** while the security level for a **Finance and Administration** staff is only **12**. The employee should have an assigned creditor number for the payroll administration purposes. The creditor number should be the same as the employment ID.

3.1.2 Creating payroll information

This tab allows you to maintain and view employees' payroll information, such as the payroll data and payroll components. The results will show the calculated amount for the periods where payroll has been generated. To indicate the different status of the payroll entries, the following legends are used:

— This indicates the component which has been linked to the employee but not calculated yet. The component can be deleted.

— This indicates the component which has been calculated. It cannot be deleted.

— This indicates the component which has been authorized. It cannot be deleted.

— This indicates the component which has been processed. It cannot be deleted.

Before you can create any payroll information, you must create an employee or select a newly-created one from HR → People → Maintain or Payroll → People → Maintain. Without the relevant employee information filled in under the **General** tab, all the fields under the **Payroll** tab cannot be edited.

To create payroll information:

1. Go to HR → People → Maintain, or Payroll → People → Maintain.
2. Select an employee to fill in the payroll information for him/her. Click **Open** and go to the **Payroll** tab. It is mandatory that you type the date of birth at **Place of birth/Date** under the **General** tab in order to create payroll information for the employee.
3. At **Year**, type the payroll year. By default, the current payroll year follows the year defined at **Payroll settings**. For more information on the payroll settings, see *Chapter 2.2 Payroll Settings*.
4. Click **Payroll data** to view the periodic payroll data. This will also allow you to create or edit the payroll data for different periods. This is country-specific. Then, click **Close** to return to the **Payroll** tab.
5. Select an option from the list:

    - **Component** — This option will display the amount by component per period for each employee.
    - **Cost allocation** — This option will display the percentage of cost allocated to different cost centers.
    - **Hour matrix** — This option is country-specific and it gives an overview of the used cost prices in a working week.
    - **Prepayment** — This option is used to view the prepaid payments for the year in each respective month.

6. A component is a set of entities to link to the employees in order to process the payroll entries. To select **Component** in the list, click ✛ **Add** to add a component to the employee or 🖊 **Edit** to modify the selected component. You can also click 🗑 **Delete** to delete the selected component. It is enabled only if the component has not been calculated yet. Click 📁 **Component** to display the component and modify the component properties or 🔲 **Component group** to link a group of components to the employee by selecting a component group. Click 🛒 **Scale** to link the components to an employee or to maintain a component amount based on the selected scale. The scale is dependent on the variables, such as the age, job group, and a combination of age and job group according to the scale setup at Payroll → Components → Maintain. This is country-specific. Click 📄 **Copy** to copy the selected payroll component from another employee to the selected employee. Clic 🔼 **Our ref**. to view all the related **Our ref**. information for the selected transaction. It is enabled only if a processed transaction is selected. Click 🔽 **Your ref**. to view all the related **Your ref**. information for the selected transaction. It is enabled only if a processed transaction is selected. Click 📱 **Entries** to view all the entries of the selected transaction.
7. Click **Save**.
8. Click **Close** to exit.

3.1.3   Creating reference numbers

An employee may have more than one reference number besides the identity card number. This may include numbers, such as the income tax number, passport number, and other information. You can create and manage the reference numbers under the **Reference number** tab. Similarly, before you can create any reference numbers, you need to select an employee first. Without the relevant employee information filled in under the **General** tab, all the fields under the **Reference number** tab cannot be edited. For more information, see *Chapter 3.1.1 Creating general information*.

To create reference numbers:

1. Go to HR → People → Maintain or Payroll → People → Maintain.
2. Select an employee to fill in the reference numbers for him/her.
3. Click **Open** and go to the **Reference number** tab.
4. Click ✚ **New** to add a new reference number for the employee. Type or select the reference number type, description, reference number, and start date of the reference number. The reference number types available are country-specific except **Identity card**, **Passport**, **Driving license**, and **Others**. Click 🖊 **Edit** to modify the selected reference number, or **Delete** to delete the unwanted reference number.
5. Click **Save**.
6. Click **Close** to exit.

3.1.4   Creating family details

You can also create and manage the details of the family members of the employee. As with the payroll and reference number tabs, you need to select an employee first. Without the relevant employee information filled in under the **General** tab, all the fields under the **Family** tab cannot be edited. For more information, see *Chapter 3.1.1 Creating general information*.

To create family details:

1. Go to HR → People → Maintain or Payroll → People → Maintain.
2. Select an employee to fill in his/her family member details. Click **Open** and go to the **Family** tab.
3. Click ✚ **New** to add a record of a family member for the employee. Type or select the name, the relationship with the employee, and gender of the family member. Click 🖊 **Edit** to modify the selected record, or 🗑 **Delete** to delete the unwanted record.
4. Click **Save**.
5. Click **Close** to exit.

3.1.5   Viewing absence cards

This tab allows you to view the monthly and yearly planning of an employee including the absence days, entitlements, and types. By default, it shows the schedules for the current month of the current year at **Monthly**. As with previous tabs, before you can view any absence cards, you need to select an employee first. Without the relevant employee information filled in under the **General** tab, all the fields under the **Absence** tab cannot be edited. For more information, see *Chapter 3.1.1 Creating general information*.

To view absence cards:

1.   Go to HR → People → Maintain or Payroll → People → Maintain.
2.   Select an employee to view his/her absence card. Click **Open** and go to the **Absence** tab.
3.   Click **Monthly** or **Yearly** to view the monthly or yearly planning for the employee. You can select the required month, year, or unit to display the planning. You can also create an absence request by clicking the scheduled work hours on the respective dates. For more information on creating and maintaining absence requests, see *Chapter 3.4.2 Creating and maintaining absence requests*.
4.   Click Save.
5.   Click **Close** to exit.

3.1.6   Creating budgets

This tab allows you to create, maintain, delete, and authorize the budget planning for the employee. It also displays the budgeted and actual amounts for a particular year based on the defined budget scenario as grouped by the general ledger accounts, components, and items. The different font colors in the results indicate the differences in the budget status; blue for the authorized budget, red for the newly-created budget which is pending authorization, and black for the budget with null values.

Before you can create a budget, you need to select an employee first. Without the relevant employee information filled under the **General** tab, all the fields under the **Budgets** tab cannot be edited. For more information, see *Chapter 3.1.1 Creating general information*.

To create budgets:

1.   Go to HR → People → Maintain or Payroll → People → Maintain.
2.   Select an employee to view his/her budget card. Click **Open** and go to the **Budgets** tab.
3.   At **Year**, select the payroll year. It defaults to the current fiscal year.
4.   Type or select the budget scenario to display the budget for the year. You can select one of the options **from G/L account, Component**, or **Items** to display the results according to the grouping.
5.   Click ┼**New** to create a budget line for the employee. Each budget is linked to a budget scenario. Click ✐ **Edit** to modify the budget line of the employee. You can also click 🗑 **Delete** to delete the budget line of a specific period. Click ✔ **Authorise** to authorize the budget you have created.
6.   Click **Save**.
7.   Click **Close** to exit.

3.1.7 Viewing vacancies

This tab allows the authorized employee with an HR role to view the status of vacancies and to link the selected vacancy to the employee. Before you can view or link the vacancy to an employee, you need to select an employee first. Without the relevant employee information filled under the **General** tab, all the fields under the **Vacancies** tab cannot be edited. For more information, see *Chapter 3.1.1 Creating general information*.

> **Tip**:
> This tab is available only when you have integrated Exact Globe Next/Exact Globe+ with Exact Synergy Enterprise. Besides, the employee must have the HR security role to be able to view and access the Vacancies tab. for more details on creating the security roles for the employee(s), see *Chapter 2.7 Creating Security Roles*.

For more details on creating and maintaining vacancies, see *Chapter 3.2 Creating and Maintaining Vacancies*.

To view vacancies:

1. Go to HR → People → Maintain or Payroll → People → Maintain.
2. Select an employee to view the vacancies linked to the selected employee. Click **Open** and go to the
3. Vacancies tab.
4. Click ╋ **New** to link a new vacancy record to the employee by selecting the vacancy, and then clicking **Select**. Click **New** to create a vacancy or **Open** to modify the selected vacancy. Click 🖉 **Edit** to display the **Maintain: Vacancy** screen and modify the selected vacancy record or 🗑 **Delete** to remove the link of vacancy to the employee. Click ⚙ to fulfill a vacancy. It indicates the vacancy is already filled up by an applicant.
5. Click **Save**.
6. Click **Close** to exit.

3.1.8 Managing documents

This tab allows you to link, modify, and delete documents that are linked to an employee. You can attach the curriculum vitae, payroll slips, claim receipts, purchase order, and many more documents related to the employee. Before you can link any document to a personal card, you need to select an employee first. Without the relevant employee information filled under the **General** tab, all the fields under the **Documents** tab cannot be edited. For more information, see *Chapter 3.1.1 Creating general information*.

To manage documents:

1. Go to HR → People → Maintain or Payroll → People → Maintain.
2. Select an employee to whom you want to link the documents. Click **Open** and go to the **Documents** tab.
3. Click ╋ **New** to link a new document to the selected personal card or 🖉 **Edit** to modify the selected document. You can also click 🗑 **Delete** to delete the unwanted document from the personal card.
4. Click **Save**.
5. Click **Close** to exit.
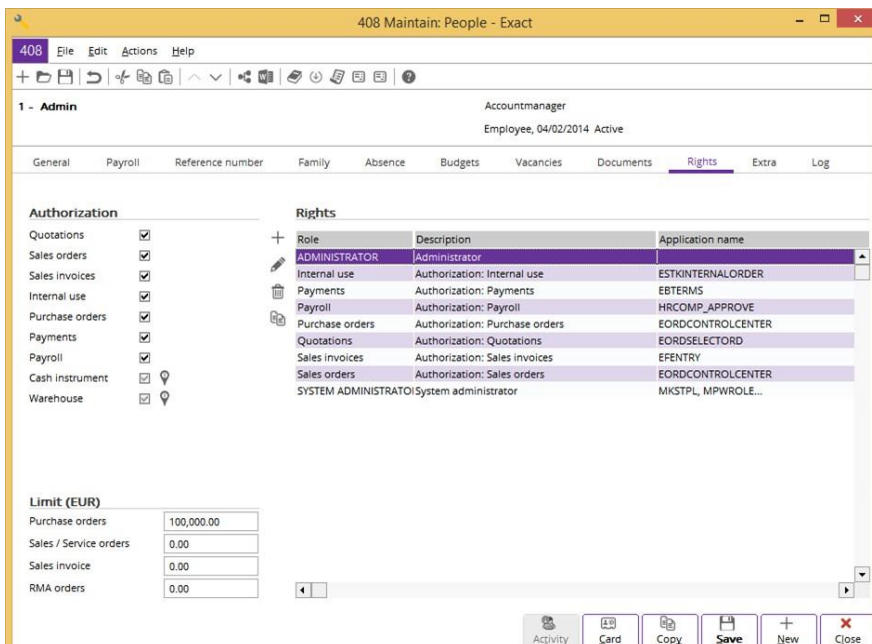
3.1.9 Assigning user rights

This tab enables you to assign and maintain the user rights of all employees in the organization. Every user right given to an employee depends on his/her security level as well as job function within the company. You must be careful when assigning the proper user rights to the employee. For example, a sales manager should be assigned the rights to authorize sales quotations, orders, and invoices. Before you can assign any rights to an employee, you need to select an employee first. Without the relevant employee information filled under the **General** tab, all the fields under the **Rights** tab cannot be edited. For more information, see *Chapter 3.1.1 Creating general information*.

In many countries, there are laws protecting the information of the citizens, therefore it is essential that information of an individual is kept private and confidential. In Exact Globe Next/Exact Globe+, an extensive security check is implemented to protect such information and is accessible by authorized personnel only. Without the **HR Maintain rights**, you will not be able to access HR → People → Maintain and therefore unable to view the private and confidential information of an account with type **Employee, Creditor**, or **Debtor** under the **Account** browser.

To assign user rights:

1. Go to HR → People → Maintain or Payroll → People → Maintain.
2. Select an employee to whom you want to assign the rights. Click **Open** and go to the **Rights** tab.
3. Select the relevant authorization check box(es) from Quotations, Sales orders, Sales invoices, Internal use, Purchase orders, Payments, Payroll, Cash instrument, to Warehouse. At Cash instrument or Warehouse, select 📍 Rights to add a new cash instrument or warehouse by clicking New or ➕ remove the selected cash instrument or warehouse from the employee by clicking 🗑 Delete. If all the purchase orders are to be authorized each time they are issued, you must select the Purchase orders check box in the Authorise section at System → General → Settings, under Purchase settings. Type the amount at Authorise from to indicate that the authorization of purchase orders is required for purchase orders that exceed the specified amount. For example, you should assign the rights to authorize purchase orders and purchase invoices approval to the purchase manager instead of the purchase staff. To control the authorization limit of a purchase manager per purchase order, you can type an amount at Purchase orders in the Limit section. The currency code after the Limit header depends on the default currency you have selected when you first set up your company. It can be found at Default currency in the Standard section at System → General → Settings, under General settings. Without specifying the amount here, he or she can authorize all purchase orders of any amount. You can see the example displayed in the following screen:

4. Click ✚ **New** to assign a new role to the selected employee or 🖉 **Edit** to modify the selected role. It is available only to an employee who has the rights to maintain roles. You can also click 🗑 **Delete** to delete the unwanted role linked to the employee, or 📄 **Copy user rights** to copy the selected user right from or to an employee. The duplicated user right can be added to the selected employee or written over the existing one. Define the relevant criteria and click **OK** to accept it. You can click **Cancel** to cancel the copying process. For more information on creating the security roles and user rights respectively, see *Chapters 2.7 Creating Security Roles* and *2.8 Creating User Rights*.
5. Click **Save**.
6. Click Close to exit.

3.1.10 Creating extra information

This tab allows you to create additional information including the general ledger account of the employee, project item, and extra fields. Before that, you need to select an employee first. Without the relevant employee information filled under the **General** tab, all the fields under the **Extra** tab cannot be edited. For more information, see *Chapter 3.1.1 Creating general information*.

To create extra information:

1. Go to HR → People → Maintain or Payroll → People → Maintain.
2. Select an employee for whom you want to create the extra information. Click **Open** and go to the **Extra** tab.
3. In the **Creditor data** section at **Name**, type the name of the employee.
4. At **Creditor account**, type or select a creditor account to define the general ledger account the employee should be allocated to. Without the creditor account defined here, the financial transactions which are related to the employee will be recorded in the general accounts payable account.
5. In the **Project** section at **Rate**, type or select the hour item of the external rate. The external rates are the sales prices of items billable to your customers. A project manager can view and maintain the rates used for a project at a glance from the project master card. Only project managers or employees with price management rights can define the project price list or project external rate structure. Like internal rates, the external rate structure is also priority-based. These priorities are structured to the net price defined in sales order lines, external rate defined in maintain projects, external rate defined in a template project (parent project), price defined in a price agreement, price defined in a pricelist, sales price of an item, and the external rate linked to the employee. However, the external rate structure is not available for trainings and production projects as these cannot be invoiced. For more details on the six types of the external rates, see *Chapter 4.3.2 External rates - To create default external rate per person* in the **Projects** user manual.
6. At **Internal rate**, type the internal rate to determine the cost price per hour realized by the employee. Internal rates are the cost prices of the items used in a project. In businesses, it is common that a company define several internal rates for the same item to use the different rates if the item is used in different projects and/or realized by different employees. Realizations are the registrations of the actual time and materials spent on a project by your employees. Therefore, the internal rate structure is very important in determining which internal rate to be used based on a priority level. This means, if several internal rates are created, the system will take the internal rate of the higher priority. If you have assigned a cost price for a specific employee for a particular project under the **People** tab under Projects → Items → Hours, the cost price defined in the **Projects** module will overwrite the default internal rate for the same employee defined here.
7. Define other relevant criteria and click **Save** to save the changes.
8. Click **Close** to exit.

3.1.11 Viewing logs

This tab allows you to view the data history which has been changed at HR → People → Maintain or Payroll → People → Maintain. Only changes to the crucial fields are logged. Before you can view any log, you need to select an employee first. Without the relevant employee information filled under the **General** tab, there will be no information in the **Creditor data** section and the fields in the **Project** and **Extra** sections are disabled at the **Log** tab. For more information, see *Chapter 3.1.1 Creating general information*.

To view logs:

1.   Go to HR → People → Maintain or Payroll → People → Maintain.
2.   Select an employee to view his/her log. Click **Open** and go to the **Log** tab.
3.   Select the relevant layout to filter the log. Each option will give you different search criteria. Define the criteria and click 👀 **Search** to display the results.
4.   Click **Save**.
5.   Click **Close** to exit.

3.2   CREATING AND MAINTAINING VACANCIES

Vacancies in an organization are unfulfilled positions with specific skill requirements and experience as outlined by the human resource department or department managers. Before you can create vacancies, you must define the available job postings in your organization. With the vacancy records, you can keep track of the vacancy ID, manager in charge, and the cost center the vacancy belongs to. Other details include the job title, commencement date, job focus, and skills requirement. You can also link the applicant(s) to the selected vacancy. Apart from creating vacancies, you can also edit, authorize, delete, reject, and reopen vacancies.

To create vacancies:

1.   Go to HR → Entries → Vacancy, and then click **New**.
2.   In the **Maintain: Vacancy** screen, type or select the vacancy ID, manager, cost center the vacancy belongs to, job title, commencement date, focus, and skill requirements of the vacancy.

> **Tip**:
> The **Skills** field is enabled only after you save the vacancy.

3. In the **Budget** section, type or select the budget scenario. Click ✛ **New** to add a budget line. It is enabled only after you have saved the vacancy record and the vacancy is in an **Active** or **Inactive** status. Click 🖉 **Edit** to modify a selected budget line or 🗑 **Delete** to delete an unwanted budget line. After adding a new budget line, you can click ✅ **Authorise** to authorize the assigned budget. Authorizing the last inactive budget line will automatically authorize the vacancy record, while authorizing the vacancy record will automatically authorize the budget line.
4. Click **Save**.
5. Click **Close** to exit.

Tip:
The status of the newly-created vacancy depends on the environment type and the settings defined. If Exact Globe Next/Exact Globe+ is integrated with Exact Synergy Enterprise and the request type is defined in Exact Synergy Enterprise, the status will be inactive. On the other hand, if it is integrated but the request type is yet to be defined in Exact Synergy Enterprise, the status will be active.

To maintain vacancies:

1. Go to HR → Entries → Vacancy. To maintain a vacancy, you have several options:

   - **Authorise** — Select the required vacancy and click **Authorise** to authorize an inactive vacancy. It is enabled only for rejected vacancies which are reopened and inactive. This action will change the status of the vacancy to **Active**. Inactive vacancies will not be available for application.
   - **Reject** — Select the required vacancy and click **Reject** to reject it. You can only reject the active and inactive vacancies that are not assigned to any applicant. This action will change the status of the vacancy to **Rejected**. You may want to reject a vacancy because the vacancy has been filled up by an applicant, or the application for the vacancy has been closed.
   - **Reopen** — Select the required vacancy and click **Reopen** to change the status of the selected vacancy from **Rejected to Inactive** or from **Fulfilled** to **Active**. When you have changed the **Rejected** status to **Inactive**, you must authorize the vacancy in order to change the status to **Active**. You may want to reopen a vacancy to review the job posting details, resume the application of the vacancy, or look for a new applicant to fulfill the vacancy as the initial hired applicant has rejected the job offer.
   - **Delete** — Select the required vacancy and click **Delete** to remove the vacancy. A message requesting for confirmation of deletion will be displayed. Click **Yes** to confirm the deletion. However, fulfilled vacancies cannot be deleted.
   - **Edit** — Select the required vacancy and click **Open** to modify the details. You cannot modify the details of vacancies with the **Fulfilled** status. **Fulfilled** vacancies will need to be reopened before the details can be edited.

2. Click **Close** to exit.

3.3 CREATING AND MAINTAINING APPLICANTS

At HR → Entries → Applicant, you can create job applications and keep track of all the applicants, their records as well as the vacancies that they apply to. This function also enables you to link the applicant to a single or multiple vacancies. You can maintain and view the applicant's particulars and status, or to attach a document.

To create applicants:

1. Go to HR → Entries → Applicant, and then click **New**.
2. In the **Maintain: Applicant** screen, type or select the applicant ID, last name, address, manager, cost center the applicant is assigned to, and job focus under the **General** tab.
3. Under the **General** tab, click **Save** to save the changes before proceeding to type any information in the following tabs.
4. Under the **Vacancies** tab, click ✚ **New** to add a vacancy. This is enabled only after you have saved the applicant's record. You can only an active vacancy to the applicant. Click 🖊 **Edit** to modify a selected vacancy or 🗑 **Delete** to delete an unwanted vacancy.
5. Go to the **Documents** tab. Click ✚ **New** to attach a document to the applicant's record. It is enabled only after you have saved the record. Click 🖊 **Edit** to modify a selected document or 🗑 **Delete** to delete an unwanted document that is linked to the applicant.
6. Click **Save**.
7. Click **Close** to exit.

> **Tip**:
> The status of the newly-created vacancy depends on the environment type and the settings defined. If Exact Globe Next/Exact Globe+ is integrated with Exact Synergy Enterprise and the request type is defined in Exact Synergy Enterprise, the status will be inactive. On the other hand, if it is integrated but the request type is yet to be defined in Exact Synergy Enterprise, the status will be active.

To maintain applicants:

1. Go to HR → Entries → Applicant. To maintain an applicant, you have several options:

    *   **Reject** — Select the required applicant and click **Reject** to reject it. This action will change the status of the applicant to **Rejected**. You may want to reject an applicant because the applicant does not fulfill the minimum requirements for the job posting, the vacancy has been filled up by another applicant, or the application for the vacancy has been closed.
    *   **Reopen** — Select the required applicant and click **Reopen** to change the status of the selected applicant from **Rejected** to **Active**. You may want to reopen an applicant's record to review his/her profile again, resume the application of the vacancy, or look for a new applicant to fulfill the vacancy as the initial hired applicant has rejected the job offer.
    *   **Delete** — Select the required applicant and click **Delete** to remove the unwanted applicant. A message requesting for confirmation of deletion will be displayed. Click **Yes** to confirm the deletion. However, fulfilled applicants, which are with the **Employee** status, cannot be deleted.
    *   **Edit** — Select the required applicant and click **Open** to modify the details. You can modify the details of the applicants with all statuses. When the applicant has filled up the available vacancy, you can change the employment type from applicant to employee. To do this, click **Person** at HR → Entries → Applicant to open the personal card, and then change the applicant ID at **User name** to the employee's user name. You can only update the active applicants to the employment type of employee, but not the inactive or rejected applicants.

2. Click **Close** to exit.

3.4   ABSENCE MANAGEMENT

Every employee in an organization is entitled to annual leave, special leave, medical leave, and other entitlements. Before creating an absence type, you must define the hour item. For more information on creating and maintaining hour items, see *Chapter 2.1 Creating and Maintaining Hour Items*.

3.4.1   Generating absence entitlements

Generating absence entitlements is to calculate the modified entitlements that are defined for all employees. This usually has to be done at the beginning of every fiscal year or when an employee is newly-employed. You are not able to generate absence entitlement for a closed financial period. The period field in the generate absence entitlements screen will be in red with a message "Period is Closed" when the specified period is closed. For more information, see *Chapter 2.11.2 Absence Entitlements - Generating opening balance of entitlements*.

From here, you can also define the different absence entitlements to particular employee(s) only. For example, a new employee may only be entitled seven days of vacation leave instead of 14 days. In this case, you can define a new entitlement for the particular employee only for seven days.

To generate absence entitlements:

1. Go to HR → Reports → Absence balance list.
2. Type a fiscal year at **Year**. This is mandatory.
3. Define the rest of the relevant criteria and click **Refresh** to list all the absence entitlements for the employees.
4. In the **Balance list** screen, click **Entitlement**. Steps 3 and 4 are applicable only if you are accessing the absent entitlement through HR → Reports → Absence balance list.
5. In the **Maintain absence entitlement** screen, select an absence type and click **Open** to modify the entitlement of the selected absence type for all employees. Click **New** to create a person-specific absence entitlement of the selected absence type. Click **Save** to save the changes or **Delete** to delete the absence entitlement. Click **Close** to exit.
6. You can also modify the absence entitlement for a specific person. Select the absence type, and then click **Zoom** to display the person-specific entitlements for all employees. In the **Entitlement** screen, select the required employee, and then click **Open** to modify the entitlement unit. In the **Maintain absence entitlements** screen, you can type a new entitlement unit at **Days** or **Hours**. The employee cannot be edited. Click **New** to create a person-specific absence entitlement of the selected absence type. Click **Save** to save the changes, and then **Close** to exit from the **Maintain default absence entitlement** screen. If you want to delete the absence entitlement, click **Delete**, and then **Close** to exit.
7. In the **Balance list** screen, click **Refresh**. You will notice that the new or modified absence entitlements are not updated. To update the entitlements, generate the entitlements each time you create or modify one. Define the relevant criteria, and then click **Generate**.
8. Select the required absence type you have modified and type the fiscal year to be generated.
9. Click **Filter** to show or hide the **Selection** section. Type or select the required cost center and employee respectively.
10. Select the **Payroll employee** check box to allow the entitlements to be generated for all payroll employees whose payroll data and payroll components are linked. You can clear this check box to generate the entitlements for all the new and existing employees.
11. Click **Refresh** and the **Copy** screen will be displayed. Four entitlement methods are available:

- **Entitlement** — This method generates the absence entitlements of the employees for the current fiscal year based on the corporate-level and person-specific entitlements in the displayed results. Corporate- level entitlements are applied to all employees who are not attached to any person-specific entitlement. Person-specific entitlements are specifically assigned to particular employee(s) only.
- **Previous year** — This method generates the absence entitlements of the employees from the previous year to be treated as the entitlements for the current fiscal year.

- **Entitlement (Actual labor hours)** — This method generates the absence entitlements of the employees based on the **Source** setting of the payroll component in the **Calculation** section. This can be done when you create a payroll component at Payroll → Components → Maintain. If none of the **Contract** components is linked to an employee, the absence entitlements will be generated based on the actual labor hours realized by the employees. However, if one of the payroll components where **Source** is **Contract** is linked to an employee, the absence entitlements for the employee will be set to zero and no absence entitlement will be generated. **Period** is enabled when you select this. If you generate the entitlements for a specific period or month, then you are able to see the breakdown of the respective entitlements for each month. Otherwise, you will only see the total entitlements for the year without the breakdowns for each month. You can do this at HR → Reports → Absence balance list. From here, click **Display** to list all the absence entitlements for the employees. In the **Balance list** screen, select the entitlement under the **Entitled** column, and then click **Zoom** to view the prorated entitlements for each month.

- **Entitlement (Contract Hours)** — This method generates the absence entitlements of the employees based on the payroll component of the option **Contract** linking to the employees at **Source** in the **Calculation** section. This can be done when you create a payroll component at Payroll → Components → Maintain. When there is a **Contract** component linked to an employee, the entitlement will be generated based on the Master Resource Schedule (MRS) hours for the employees. However, if none of the payroll components where **Source** is **Contract** is linked to an employee, the absence entitlements for the employee will be set to zero and no absence entitlement will be generated. **Period** is enabled when you select this. If you generate the entitlements for a specific period or month, then you are able to see the breakdown of the respective entitlements for each month. Otherwise, you will only see the total entitlements for the year without the breakdowns for each month. You can do this at HR → Reports → Absence balance list. From here, click **Display** to list all the absence entitlements for the employees. In the **Balance list** screen, select the entitlement under the **Entitled** column, and then click **Zoom** to view the prorated entitlements for each month. Select **Entitlement, Previous year, Entitlement (Actual labor hours)**, or **Entitlement (Contract Hours)**, and then click **OK** to generate the entitlements. By default, **Period** shows the current month. Click **New** to generate an absence entitlement.

12. Click **Save** to save the generated entitlements. If there is an entitlement generated previously, you will see a message asking for confirmation to overwrite the old value. Click **OK** to confirm it. After saving, every employee will have the same absence entitlements except for those who are assigned specific prorated entitlements based on the start date and FTE of the employees.
13. Click **Close** to exit.

Tip:
To view the financial transactions of the generated absence entitlements, go to the relevant general ledger cards at Finance → General ledger → Cards. The general ledger accounts to be selected are defined earlier under the **Financial** tab when creating the hour items for the respective absence types at HR → Planning → Hours. For more information on creating and maintaining hour items, see *Chapter 2.1 Creating and Maintaining Hour Items*. Select the required general ledger account, and then click **Display**. In the **General ledger card** screen, click **Our ref.** to view the financial transactions of the selected general ledger accounts for the generated absence entitlement.

3.4.2 Creating and maintaining absence requests

An absence request is a leave application submitted to the human resource department when an employee is unable to perform the daily duties in the organization. Every employee is assigned a total number of absence entitlements each year. The entitlements vary depending on the policy and business operation of the company.

Only employees with an **Administrator** role and authorized personnel assigned the HR administrator roles and rights have the authority to view and modify the planning for all employees. You can create the absence requests for single and multiple employees.

To create absence requests for a single employee:

1. Go to HR → Entries → Absence.
2. In the **Absence card** screen, click **Absence** to create an absence request for a single employee.
3. In the **Absence** screen, select the type of absence and type the reason for the absence at **Absence type** and **Reason** respectively. These are mandatory.
4. At **Start date** and **End date**, define the start and end dates of the absence. **Start date** is mandatory. **End date** can be mandatory or optional depending on the setting defined for the absence type at **End date** in the **Field** section at System → HR & Security → Absence types.
5. Type the values at **Hours** and **Days.** These fields are enabled only if the **Manual entry** check box is selected. To enable the **Manual entry** check box, go to System → HR & Security → Absence types, select an absence type, and then click **Open**. In the **Field** section, select **Duration**, and then click ✎ **Edit**. Next, select **Person** at **Use: Schedule**. For more information, see *Chapter 2.6 Creating Absence Types.*
6. Click **Save** to save the changes.
7. Click **Close** to exit.

To create absence requests for multiple employees:

1. Go to HR → Entries → Absence.
2. In the **Absence card** screen, click **Multiple** to create an absence request for multiple employees.
3. In the **Multiple: Absence** screen, type the description for the absence request at **Description**.
4. Once you have defined other relevant criteria, click **Generate**.
5. In the second **Multiple: Absence** screen, define the start time and end time of the absence or the hours and days of the absence.
6. Click **Save** to generate the absence request.
7. Click **Close** to exit.

3.5 PLANNING

In an organization, it is crucial to plan for all employees based on the capacity available. You have the option to plan for a particular employee as well as the subordinate(s) of the employee for the year. In the capacity planning, you can have an overview of the calculated percentage of the total capacity used by the employee according to the gross absence, absence recorded, and net absence within a specified period. You can also do a project-specific and allocation planning for the employee as well as comparison with the actual capacity used.

You must first define the employee with the **Administrator** role, or HR roles and rights for the particular employee(s) with the function of creating the tasks planning for other employee(s). For more information on creating security roles and user rights, see *Chapters 2.7 Creating Security Roles* and *2.8 Creating User Rights* respectively.

3.5.1 Personal resource planning

You can make personal planning or create a task planning for the subordinate(s) of the specific employee. You can view the employee planning by day, weekday, week, or month. For example, you have planned a four-day task for Wing Chan from December 14, 2015 to December 17, 2015 for the MRP project. The number of working days is only based on the normal working days.

To create personal task planning:

1. Go to HR → Planning → Personal or Projects → Planning → Resource planning.
2. In the **Planning (Personal)** screen, click **Task** to create a personal task planning.
3. In the **Planning** screen, type or select the project at **Project**. This is mandatory.
4. Define the date(s) of the task planning at **Date** and **to**.
5. Type the description at **Description**. This is mandatory.
6. Type the quantity of days or hours and select the hour item at **Qty.** and **Item** respectively. These are mandatory.
7. At **Person**, type or select the person for whom the task planning is created. This is mandatory. By default, the person selected in the **Planning (Personal)** screen will be filled at **Person** and the cost center of the person will automatically be filled at **CCtr.**.
8. Define other criteria. The unit price at **Price**, total project cost at **Amount**, and **G/L** account at **G/L** will be generated automatically after you type or select a value at **Qty.** and **Item** respectively. You can create recurring entries with the same details for the task planning by clicking **Recurring**. For more information on the created tasks, see *Chapter 3.5.1 Personal resource planning - To view personal resource planning overview*.
9. Click **Save** to save the task. If the planned schedules exceed the normal working days, a message will be displayed. Click **Yes** to confirm that the employee is overworked or **No** to follow planned schedules of the normal working days.
10. Click **Close** to exit.
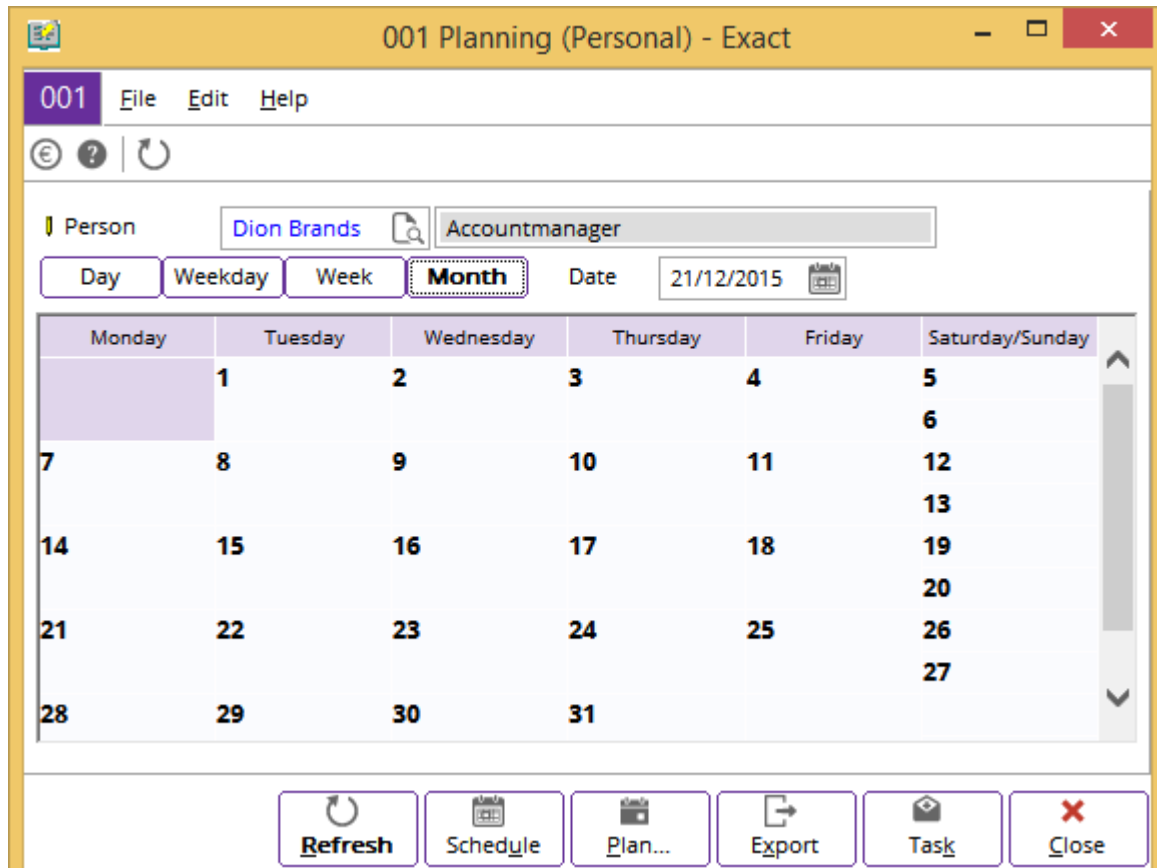
The personal resource planning overview gives you an insight into the MRS planning of the selected employee, which can be viewed by day, weekday, week, and month.

To view personal resource planning overview:

1. Go to HR → Planning → Personal.
2. In the **Planning (Personal)** screen, type or select the employee and planned date. If you do not type or select a date, it defaults to the current date.
3. Click **Refresh** to view the personal resource planning overview for the selected employee. You can select the required layout by clicking **Day**, **Weekday**, **Week**, or **Month**.
4. Click **Close** to exit.

3.5.2 Resource planning of subordinates

To create task planning for subordinates:

1. Go to HR → Planning → Subordinates.
2. Type or select the manager at **Manager**.
3. Click **Refresh**.
4. In the **Planning (Subordinates)** screen, select a subordinate, and then click **Task** to create a task planning for the subordinate.
5. In the **Planning** screen, type or select the project at **Project**. This is mandatory.
6. Define the date(s) of the task at **Date** and **to**.
7. Type the description at **Description**. This is mandatory.
8. Type the quantity of days or hours and select the hour item at **Qty.** and **Item** respectively. These are mandatory.
9. At **Person**, type or select the person for whom the task is created. This is mandatory. The cost center of the selected person will automatically be displayed at **CCtr.**.
10. Define other criteria. The unit price at **Price**, total project cost at **Amount**, and G/L account at **G/L** will be generated automatically after you have typed or selected a value at **Qty.** and **Item** respectively. You can create recurring entries with the same details for the task by clicking **Recurring**. To view the created tasks of the subordinates, see *Chapter 3.5.2 Resource planning of subordinates - To view resource planning overview of subordinates*.
11. Click **Save** to save the task planning. If the planned schedules exceed the normal working days, a message will be displayed. Click **Yes** to confirm that the employee is overworked or **No** to follow planned schedules of the normal working days.
12. Click **Close** to exit.

The subordinate planning overview gives you an insight into the MRS planning of the selected employee, which can be viewed by the current date, daily, weekly, or monthly basis. You can see the overview in five different planning statuses based on the legends and columns:

- **Planned** — This status indicates the schedules have been planned.
- **Not planned** — This status indicates the schedules have yet to be planned.
- **Incomplete planned** — This status indicates the schedules are not completely planned.
- **Absence** — This status indicates the absence taken.
- **Over planned** — This status indicates the schedules are planned beyond the defined work hours of the employee.

To view resource planning overview of subordinates:

1. Go to HR → Planning → Subordinates.
2. In the **Planning (Subordinates)** screen, type or select the employee and planned date. If you do not type or select a date, it defaults to the current date. Next, click **Refresh** to view the subordinate resource planning overview for the selected employee. You can select the required layout by clicking **Day**, **Weekday**, **Week**, or **Month**.
3. Click **Close** to exit.

3.5.3 Capacity planning

The capacity resource planning overview gives you an insight into the MRS planning and project records of the selected employee as well as the actual project records. It also compares and measures the planned and actual allocation percentages based on the gross capacity, net capacity, and absence recorded.

To create capacity task planning:

1. Go to HR → Planning → Capacity.
2. Click **Task** to create a capacity task planning.
3. In the **Planning** screen, type or select the project at **Project**. This is mandatory.
4. Define the date(s) of the task at **Date** and **to**.
5. Type the description at **Description**. This is mandatory.
6. Type the quantity of days or hours and select the hour item at **Qty.** and **Item** respectively. These are mandatory.
7. Define other criteria. The unit price at **Price**, total project cost at **Amount**, and G/L account at **G/L** will be generated automatically after you type or select a value at **Qty.** and **Item** respectively. You can create recurring entries with the same details for the planning by clicking **Recurring**.
8. Click **Save** to save the task planning. If the planned schedules exceed the normal working days, a message will be displayed. Click **Yes** to confirm that the employee is overworked or **No** to follow planned schedules of the normal working days.
9. Click **Close** to exit.

The capacity planning overview displays the capacity analysis of an employee by dates, absences, allocation between planned and actual capacity usage, and net capacity.

To view capacity planning overview:

1. Go to HR → Planning → Capacity.
2. In the **Planning** screen, type or select the range of the planned date. If you do not type or select a date, it defaults to the current date. You can select the check box(es) of **Absence** or/and **Unassigned tasks** if you want to include the absences or/and unassigned tasks of the employee(s) in the results.
3. Click **Refresh** to view the capacity planning overview for the selected date(s). You can select the required layout to group by **Person** or **Project**.
4. Click **Close** to exit.

4. MANAGEMENT INFORMATION

In a business operation, it is vital to prepare different types of reports for the human resource administration. By having these reports, you can have overviews of the employees by their birth dates, marriage anniversaries, personnel information, headcounts, application information, roles, contracts, or employment details. Apart from that, you can also generate the financial reports, such as the budget report and pivot analysis, and overviews of absenteeism. All these will provide you with extensive information about your employees. With the information, you can manage them easier.

4.1 OVERVIEW OF ANNIVERSARY LISTS

This report allows you to view a list of birth dates, years of service, or marriage anniversaries by employees, cost centers, employment status, marital status, employment types, and age groups. This allows you to keep track of your employees' important dates.

To view the **Anniversary list** report, go to HR → Overviews → Anniversary list and select the appropriate layout. You can choose to display the report by **Birthday**, **Years of service**, or **Years married**. Define the relevant criteria, and then click **Start**.

The **Birthday** layout will display the birth dates of your employees. You can group this by the cost center or month. The **Years of service** layout will display the number of years each employee has been working in your organization. The **Years married** layout will display the number of years the employee has been married as well as the anniversary date.

Birthday list by month

User	pang290915	Company	001 Moonkite Media	Report #	700702
Cost center	All	**Start date**		**Include**	Active
Person	All	**End date**			Inactive
					Hired

Month	February				
Birthday (Age)	**Person**	**Full name**	**Job title**	**Cost center**	**Gender**
7, Tue (26)	9	Priya A/P Subrama	Marketing Staff	Standaard kostenplaats	Female

Month	April				
Birthday (Age)	**Person**	**Full name**	**Job title**	**Cost center**	**Gender**
20, Wed (26)	7	Hoo Min Wan	Product Design Manager	Standaard kostenplaats	Male

Month	May				
Birthday (Age)	**Person**	**Full name**	**Job title**	**Cost center**	**Gender**
1, Sun (31)	6	Anson Chan	Finance & Administration Staff	Standaard kostenplaats	Male

Month	June				
Birthday (Age)	**Person**	**Full name**	**Job title**	**Cost center**	**Gender**
20, Mon (32)	2	Jenny A.Marrianne	Finance & Administration Staff	Standaard kostenplaats	Female
2, Thu (34)	8	chee yan Hoh	Marketing Staff	Standaard kostenplaats	Female
16, Thu (28)	12	Hyo Ryi Choo	Channel Management Staff	Standaard kostenplaats	Female

Month	July				
Birthday (Age)	**Person**	**Full name**	**Job title**	**Cost center**	**Gender**
26, Tue (30)	3	Elaine Chey	Human Resources Manager	Standaard kostenplaats	Female

In this example, the anniversary list is for birthdays and is sorted by months. In this way, you can see that there are birthdays in February, April, May, June, and July.

4.2 OVERVIEW OF PERSONNEL DETAILS

The **Personnel details** report displays vital personnel details that are retrieved from the personal cards of the selected employees. The information that can be retrieved include the user name, employee ID, full name, date of birth, place of birth, gender, addresses, employment details, and family information of the employee. All of these are important information that a human resource department should maintain. This report is presented in a formatted layout on a single page, which you can print and file as a hard copy.

To view the **Personnel details** report, go to HR → Overviews → Personnel details and define the relevant criteria. Click **Start** to generate the report.

Personnel details by employee					
User	pang290915	Company	001 Moonkite Media	Report #	700703

Personnel details				Employment			
Person	1			Employee type	Employee	Status	Active
User name	PANG290915			Start date	2/3/2012		
Name	Jeffrey M.andrew			FTE	1.00		
Maiden name		Initials		Cost center	Standaard kostenplaats (KP01)		
Date of birth	18/9/1983	Age	28.47	Job title	Finance & Administration Director (FA DIR)		
Place of birth				Job level	0		
Nationality		Gender	Male	Manager			
Marital status		Date		Assistant			
Social security no.				Payroll	No		
Address				**Contact**			
Address				Telephone		Mobile	
				E-mail			
				Office			
	Netherlands			Main location		Room	
				Telephone		Extension	
				Mobile			
				E-mail			

Personnel details				Employment			
Person	2			Employee type	Employee	Status	Active
User name	A.MA2			Start date	2/3/2012		
Name	Jenny A.Marrianne			FTE	1.00		
Maiden name		Initials		Cost center	Standaard kostenplaats (KP01)		
Date of birth	20/6/1979	Age	32.71	Job title	Finance & Administration Staff (ADM ASS SR)		
Place of birth				Job level	0		
Nationality		Gender	Female	Manager	Jeffrey M.andrew (1)		
Marital status	Single			Assistant			
Social security no.				Payroll	No		

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The information in the **Personnel details** report is taken from the data or card of each employee. **FTE** in the **Employment** section indicates the employment status of the employee. Full Time Equivalent (FTE) is the ratio of how much an employee works. A value of 1.00 means the employee is working the standard full time with the organization while anything less than that indicates the employee is working part time.

The **Job level** data shows the level the employee is in for the given job title. In large organizations, a job title, such as Account Management Staff, may have different levels. This is to show the hierarchy within the organization as well as to define the career growth within the same job activity. For example, instead of having separate job titles, different job levels can be used to separate Junior Account Management Staff, Account Management Staff Executive, and Senior Account Management Staff. This is distinctly different from **Security level** that governs access to certain data and functions. More information on creating job levels can be found in *Chapter 3.1 Creating and Maintaining Entries for People*.

The **Payroll** data shows whether payroll has been prepared for the employee. This is to calculate the monthly wages of the employee. The birth date of the employee is required for creating **Payroll data**. More information on creating payroll data can be found in *Chapter 3.1 Creating and Maintaining Entries for People*.

4.3 OVERVIEW OF CONTRACTS

The **Contracts** report can be used when you want to check on the employment dates of your employees. This is especially helpful if some of your employees are working on a contract basis. It can tell which contracts are expiring soon. If the contract is ending soon, you will have to review whether to proceed with the contract renewal process or terminate the existing contract.

To view the **Contracts** report, go to HR → Overviews → Contracts and define the relevant criteria. Click **Start** to generate the report.

Contracts				
User Jeffrey M.andrew			**Company** 1 Moonkite Media	
Cost center All			**Contract start date** All	
Person All			**Contract end date** All	

Type	Start date	End date	Description	
2 - Jenny A.Marrianne				Active
Bepaalde tijd	2/3/2012		Bepaalde tijd	
3 - Elaine Chey				Active
Bepaalde tijd	2/3/2012		Bepaalde tijd	
4 - Elizabeth Henderson Minni				Active
Bepaalde tijd	2/3/2012		Bepaalde tijd	
5 - Li Zhen				Active
Bepaalde tijd	2/3/2012		Bepaalde tijd	
6 - Anson Chan				Active
Bepaalde tijd	2/3/2012		Bepaalde tijd	
7 - Hoo Min Wan				Active
Bepaalde tijd	2/3/2012		Bepaalde tijd	
8 - chee yan Hoh				Active
Bepaalde tijd	2/3/2012		Bepaalde tijd	
9 - Priya A/P Subrama				Active
Bepaalde tijd	2/3/2012		Bepaalde tijd	
12 - Hyo Ryi Choo				Active
Bepaalde tijd	5/3/2012		Bepaalde tijd	
13 - Matt Crawford				Active
Bepaalde tijd	5/3/2012		Bepaalde tijd	

The above example shows employees and their contract validity dates. If an employee does not have a contract end date, it is assumed that the employee is a permanent staff. If the employee has a contract end date, it is assumed that the employee is either a contract staff or a permanent staff that has resigned.

You can use this report to review the contracts that will be ending soon and act accordingly. This can be done by setting the search criteria of the contract end date to today or, preferably, later. If you set the end date to be, for example, two months later, then the report will show contracts that are due to end in two months' time.

4.4 OVERVIEW OF ROLES

The **Roles** report lists the roles assigned to each employee. This report helps you to review the roles your employees are accorded with. This is important because roles are associated with security levels, and security levels need to be managed properly in order to limit your organization's data to relevant personnel only.

To view the **Roles** report, go to HR → Overviews → Roles and define the relevant criteria. Click **Start** to generate the report.

Users per role

User	pang290915	Company	001 Moonkite Media		Report #	658944
Cost center	All	Role	All	✓	Access rights	
Person	All			✗	No rights	

FINANCE Finance and accounting

	User name	Person	Job title	Cost center	Description
✓	A.MA2	Jenny A.Marrianne, 2	ADM ASS SR	KP01	Standaard kostenplaats
✓	HEND4	Elizabeth Henderson Minni, 4	DIR DIV	KP01	Standaard kostenplaats
✓	PANG290915	Jeffrey M.andrew, 1	FA DIR	KP01	Standaard kostenplaats

HR HR

	User name	Person	Job title	Cost center	Description
✗	CHEY3	Elaine Chey, 3	HR MAN	KP01	Standaard kostenplaats
✓	HEND4	Elizabeth Henderson Minni, 4	DIR DIV	KP01	Standaard kostenplaats
✓	PANG290915	Jeffrey M.andrew, 1	FA DIR	KP01	Standaard kostenplaats
✓	ZHEN5	Li Zhen, 5	HR	KP01	Standaard kostenplaats

HUMAN RESOURCE Human Resource

	User name	Person	Job title	Cost center	Description
✗	CHEY3	Elaine Chey, 3	HR MAN	KP01	Standaard kostenplaats
✓	HEND4	Elizabeth Henderson Minni, 4	DIR DIV	KP01	Standaard kostenplaats
✓	PANG290915	Jeffrey M.andrew, 1	FA DIR	KP01	Standaard kostenplaats
✓	ZHEN5	Li Zhen, 5	HR	KP01	Standaard kostenplaats

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The **Roles** report obtains information from the personal card under the **Rights** tab. You can choose to view the report based on roles or employees. The example shows a report displayed based on roles. The report displays important details of the employees, such as the user name, employee name, job title, and cost center of the employee. Employees are grouped by roles, showing you the employees and their corresponding role(s).

An employee with a green check mark preceding the user name means he or she is assigned that role or right. If the employee has no rights assigned at all, you will see a red cross before the user name.

4.5 OVERVIEW OF EMPLOYMENTS

The **Employment** report provides information on employee turnover in your organization. This report is able to show you the effectiveness of your organization in retaining employees. Employee turnover is normal for a business. However, excessive turnover needs to be identified and rectified. This report details the inflow and outflow of employees giving management the ability to identify periods of large turnover. The management can then use the opportunity to investigate the cause for this.

To view the **Employment** report, go to HR → Overviews → Employment and define the relevant criteria. Click **Start** to generate the report.

Inflow / Outflow

User	pang290915	Company	001 Moonkite Media	Report #	700408
Layout	Inflow & Outflow	Year	2012	Type	Employee
Cost center	All	Month	All		Contractor
Job group	All				Student
					Temporary

Month	Inflow/ Outflow	Count	Count (%)	FTE	FTE (%)
March	Inflow	11.00	100.00	11.00	100.00
	Total: Inflow	**11.00**		**11.00**	
	Total: Outflow	**0.00**		**0.00**	

The example provides information on both inflow and outflow of employees for all months in the year 2012. For instance, in March, there were 11 new employees.

The **FTE** column indicates the proportion of time the employee spent working in the organization. For instance, in March, all the 11 employees contributed to 11.0 FTE. It can be assumed that all the 11 employees are working full time.

4.6 OVERVIEW OF HEADCOUNTS

In an organization, the human resource staff would view the headcount reports for several reasons, such as budgeting for the employees, checking the turnover of the employees in an organization, ascertaining the employees' seniority within the company or age statistics, salary as well as the rating of the employees. All of these will help you understand your workforce better. By having a greater comprehension of your talent pool, you can make informed decisions.

These reports provide the headcounts overview and statistics of the company's employees. You have the option to view/generate the report by:

- People
- Organization
- Years of service
- Age
- Salary
- Rating

4.6.1 Headcount report by people

You can generate the **Balance - People** report to find the balance between the actual and budgeted costs that is needed to maintain your organization's workforce. Examples of these costs include salary, tax, contributions to government bodies, overtime, and bonuses.

To view the **Headcount** report based on the balance between the budgeted and actual expenditure of employee costs, go to HR → Statistics → Headcount → People. Define the relevant criteria and click **Start** to generate the report.

The **Cumulative** option will add on the actual or budgeted expenditure of the previous periods. This will show you the total amount up to the current period. Disabling this will show only the changes of a particular period without taking into account previous periods.

The **Budget** option allows you to factor in a pre-defined budget scenario. Depending on availability, you may create numerous budget scenarios at System → Finance → Budget scenarios for different situations. Enabling this option will apply the budget scenarios for comparison with the actual figures.

The following report shows a report without cumulative figures compared with a budget scenario. If the bars extend above the X-axis, it is considered as revenue while bars extending below the X-axis are considered cost, such as wages. A line extending across the graph shows the balancing point between revenue and cost. This provides a point of normalcy for managers to analyze.
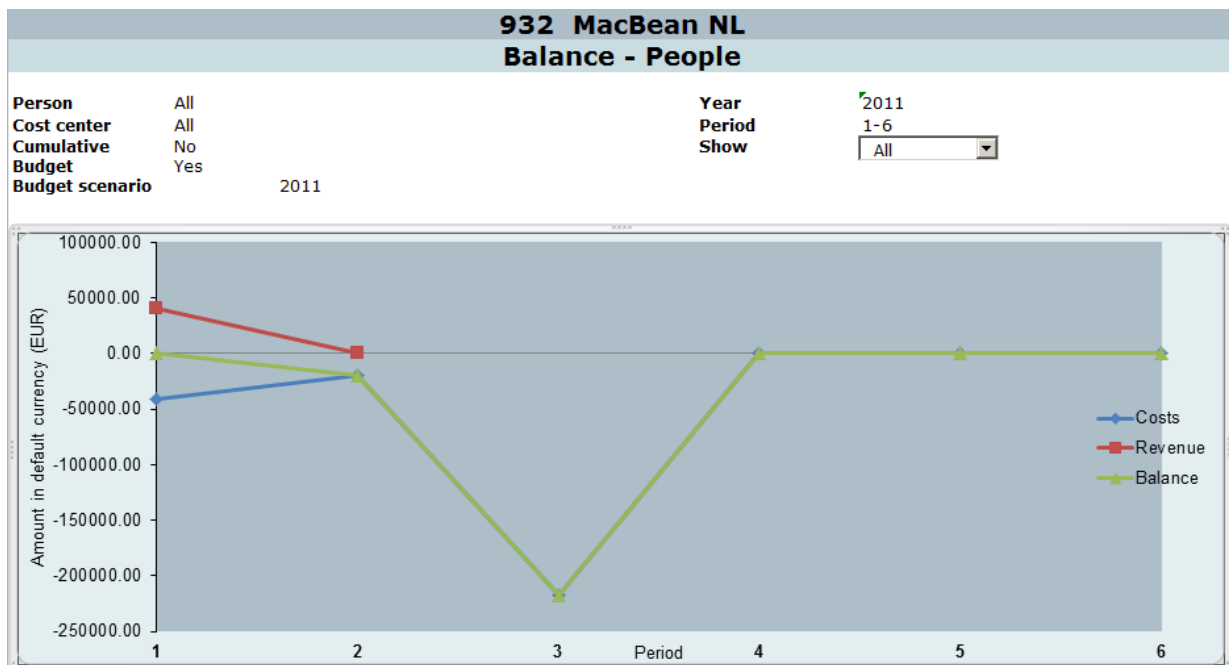
4.6.2 Headcount report by organization

This function generates the report of headcounts as grouped by organizations. From this report, you can determine the number of headcounts in an organization for a certain period of time. This will provide you with a holistic view and trends of the available workforce for your organization.

To view the **Headcount** report based on the number of employees, go to HR → Statistics → Headcount → Organization. Define the relevant criteria and click **Display** to generate the report. You can choose to display the results in a textual, bar, or pie format.

The following report displays the report in a bar format. The Y-axis shows the number of employees while the X- axis shows the months of the year as specified in the criteria.
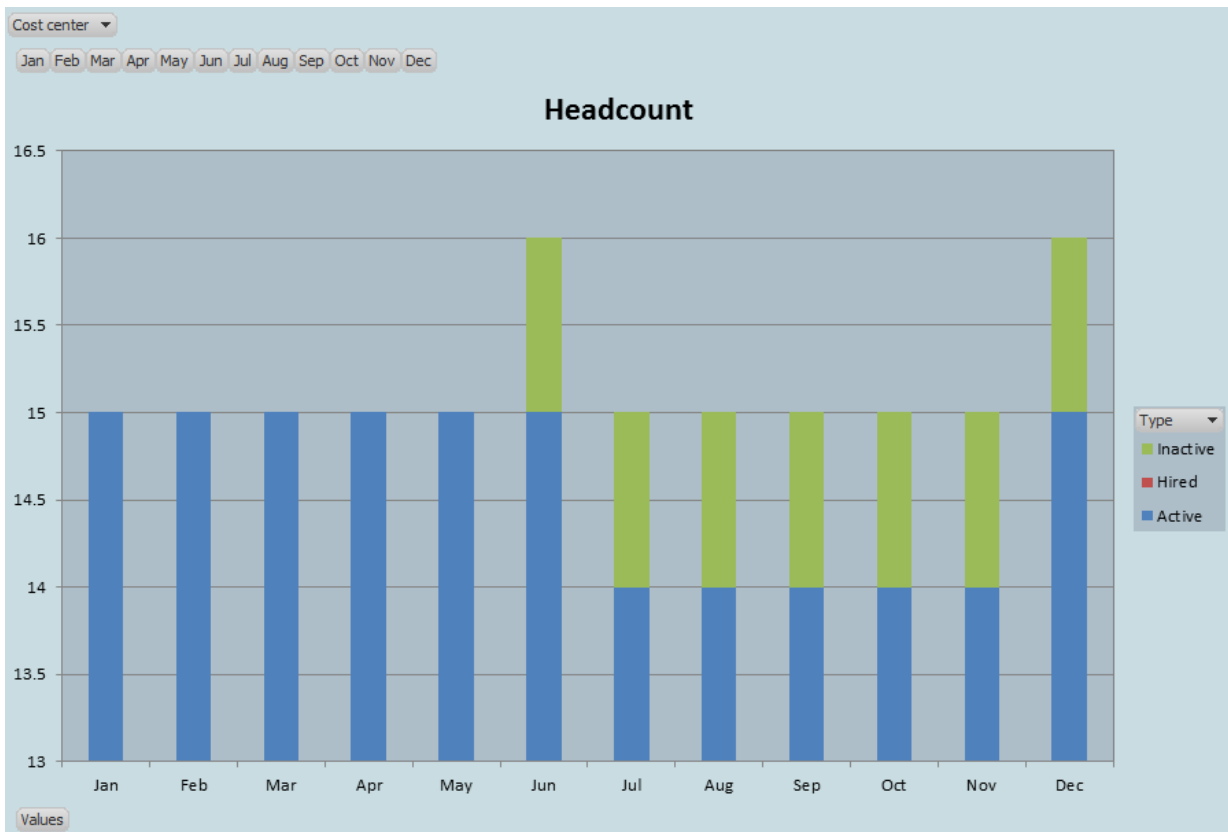
4.6.3 Headcount report by years of service

The **Headcount - Years of service** report shows the headcounts of employees by the years of service with the company. This is calculated from the date the employee joins the organization. This report can be used to deduce the amount of experience your organization has and how mature your employees are within the organization.

To view the **Headcount** report based on the number of years of service, go to HR → Statistics → Headcount → Years of service. Define the relevant criteria and click **Start** to generate the report.

In the **Group** section, you must type at least one number at **Years of service**. If more than one number is typed in, the second number must be higher than the first. The numbers typed here denote the employees' years of service. The first number will generate a result for employees who have worked less than that number of years. The second number will generate a result for employees who have worked between the first and the second numbers. For instance, if the first number is 2 and the second number is 5, this will generate a result with the first bar comprising employees who have worked less than or equal to 2 years while the second bar will comprise employees that have worked between 2 and 5 years. A third bar will show employees who have worked more than 5 years.

The following report shows the number of years the employees have worked. It can be seen that the majority of the employees have worked in the organization for more than three years. The X-axis shows the grouping of years as specified in the criteria while the Y-axis shows the number of employees. At the bottom left of the report are the results shown in text format:

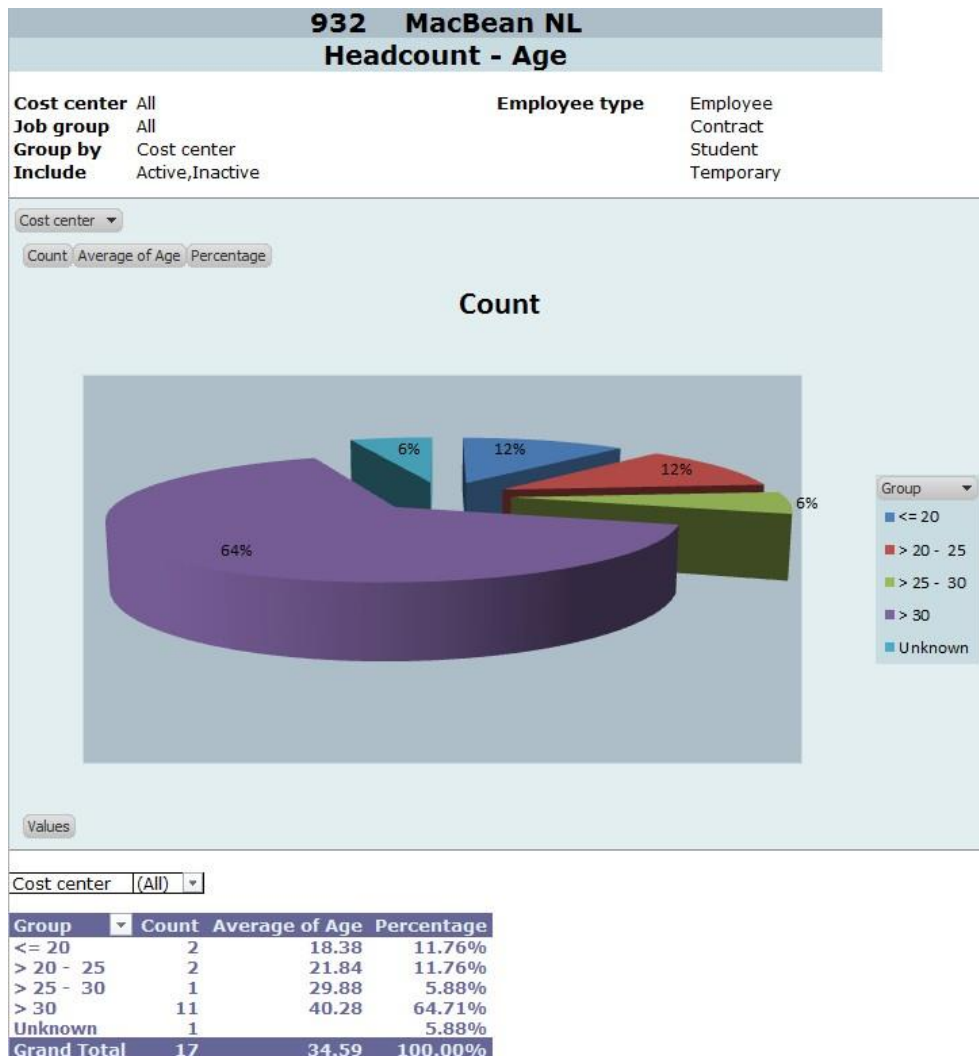| Group	Count
<= 1	3
> 1 - 2	1
> 2 - 3	4
> 3	9
Grand Total	17
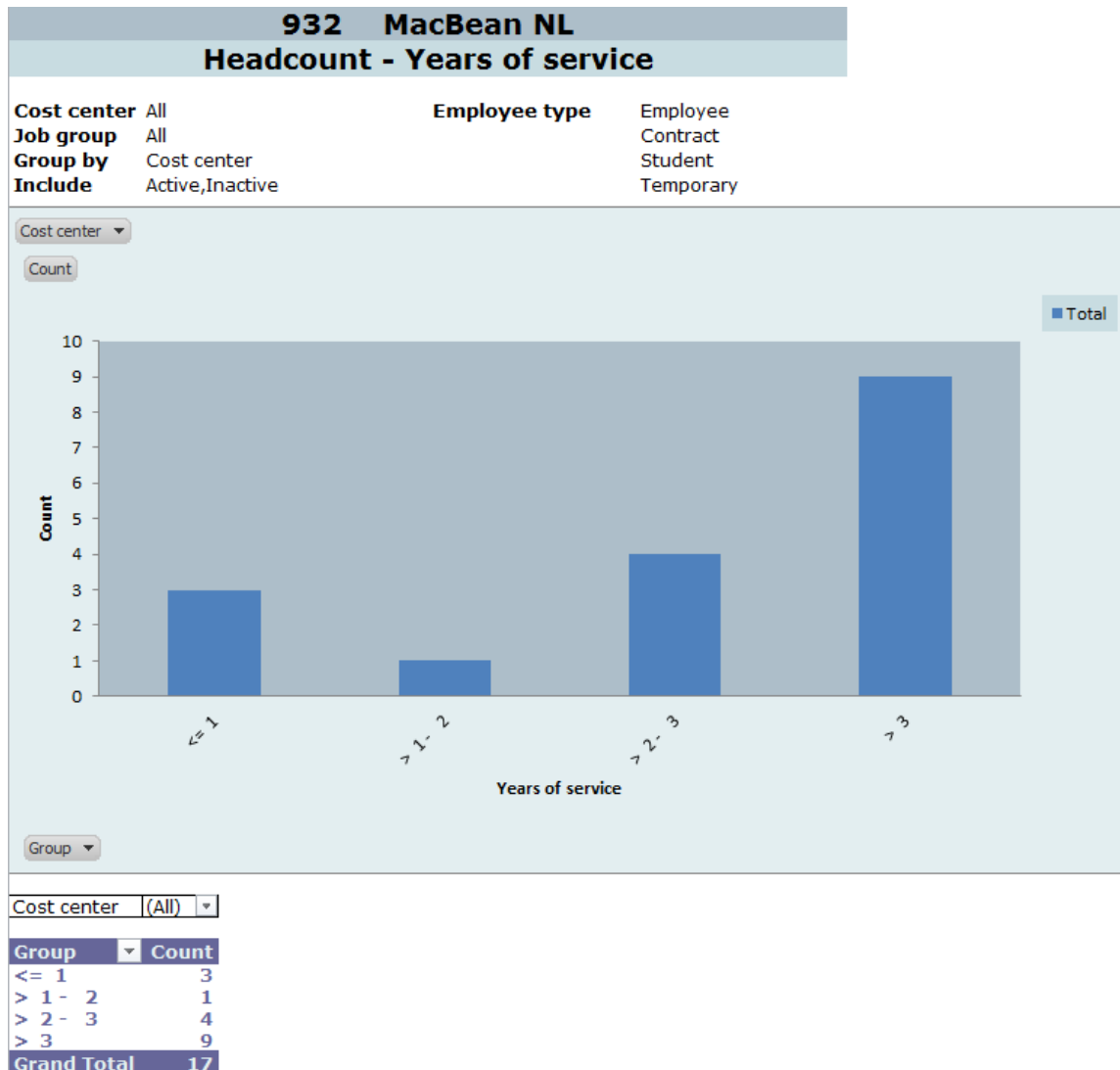
4.6.4 Headcount report by age

The **Headcount - Age** report shows the age range of all the employees in the company. This report is useful if you want to know the age groups within your organization. This can be used to review the seniority of your employees. This also can be used to indirectly deduce the experience level of your employees.

To view the **Headcount - Age** report, go to HR → Statistics → Headcount → Age. Define the relevant criteria and click **Start** to generate the report.

In the **Group** section, you must type at least one number at **Age**. If more than one number is typed in, the second number must be higher than the first. The numbers here denote the age groups of the employees. The first number will generate a result for employees who are younger than or the same age as that number of years. The second number will generate a result for employees who are between the ages of the first and the second numbers. For instance, if the first number is 20 and the second number is 25, this will generate a result with the first bar comprising employees that are younger than or are 20 years of age while the second bar will comprise employees who are between 20 and 25 years old.

The following report is grouped by cost center in a pie chart. The results also separate the age groups as defined by the criteria. At the bottom of the report, you can view the text results of the report including the age group and its corresponding number of employees who fall into that age group. It also calculates the average age for that age group. This is obtained by totaling the age in an age group and dividing it by the number of employees who are within that age group. The results also show the percentage of employees who are within that age group in the organization. The previous report shows that 64.71% of the employees are above 30 years old.

| Group	Count	Average of Age	Percentage
<= 20	2	18.38	11.76%
> 20 - 25	2	21.84	11.76%
> 25 - 30	1	29.88	5.88%
> 30	11	40.28	64.71%
Unknown	1		5.88%
Grand Total	17	34.59	100.00%

4.6.5 Headcount report by salary

The report shows the headcounts based on the salaries of the employees. You can generate this report if you want to know the statistics of the salary range of the employees. Use this report to find the salary range for your organization's largest group of employees. This will allow you to manage your employees' salary levels and remuneration expectations.

To view the **Headcount - Salary** report, go to HR → Statistics → Headcount → Salary. Define the relevant criteria and click **Start** to generate the report.

In the **Group** section, you must type at least one number in **Salary**. If more than one number is typed in, the second number must be higher than the first. The numbers here denote the employees' salary brackets. The first number will generate a result for employees who receive salaries less than that. The second number will generate a result for employees who receive salaries between the first and the second numbers. For instance, if the first number is 1,000 and the second number is 2,000, this will generate a result with the first bar comprising employees who receive less than or the same as EUR 1,000 while the second bar will comprise employees who receive between EUR 1,000 and EUR 2,000. There will be a third bar that will show the number of employees who receive more than EUR 2,000.

Based on the following report, it can be seen that the salary bracket with the highest number of employees is above EUR 3,000. This is followed by the EUR 2,000 to EUR 3,000 salary bracket. The report also shows the results in text format at the bottom. The **Count** column indicates the number of employees who are in that particular salary bracket.

Group	Count
>1000 - 2000	2
>2000 - 3000	4
>3000	7
Grand Total	**13**
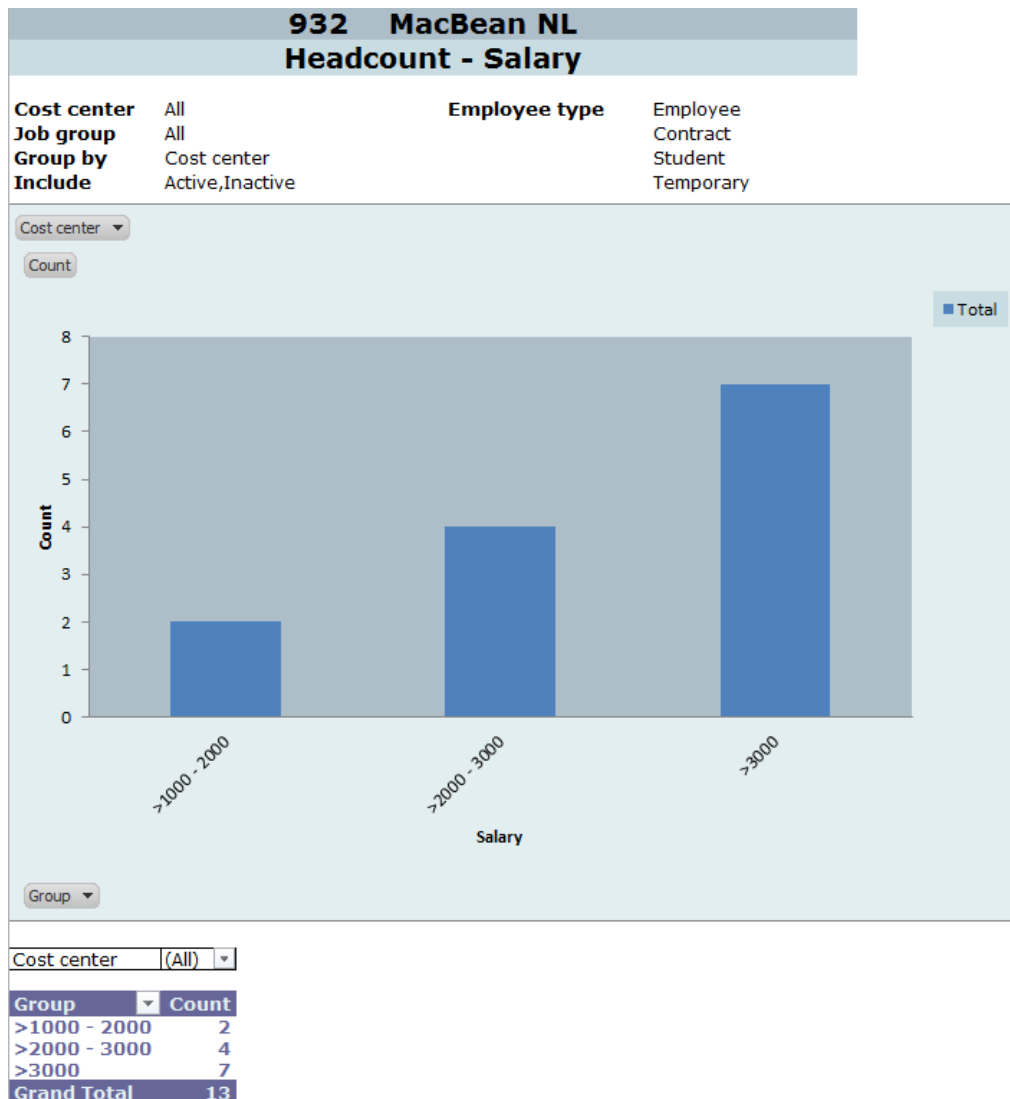
4.6.6 Headcount report by rating

This headcount report is generated based on the ratings given to the employees. This report would be used to compare the current and previous ratings of the employees, thus allowing some form of performance monitoring. Each employee can be given a current and previous rating and this is done in the personal card. A rating between A and E is available for rating purposes. The **Headcount - Rating** report compiles the current and previous rating of employees in a single place for easy viewing.

To view the **Headcount - Rating** report, go to HR → Statistics → Headcount → Rating. Define the relevant criteria and click **Start** to generate the report.

The following report lists the ratings of employees based on job groups. This shows the performance of employees with related job functions. The **Rating: Current** column can come in three colors. If there is no change, it will be in black. If there is an improvement in rating compared to the previous rating, it will be in blue, and if there is a fall in rating, it will be in red. Occasionally, an employee might receive an **Unknown** rating. This indicates that the employee was not rated.

At the bottom of the report is a summary of the ratings obtained by totaling the number of employees with ratings that improved, declined, or unchanged.

932   MacBean NL
Headcount - Rating

Cost center	All	Employee type	Employee
Job group	All		Contract
Group by	Cost center		Student
Include	Active,Inactive		Temporary

Standaard kostenplaats	Rating: Current	Rating: Previous
1, Jeffrey M.andrew	A	B
2, Jenny A.Marrianne	C	C
3, Elaine Chey	B	C
4, Elizabeth Henderson Minni	A	A
5, Li Zhen	C	B
6, Anson Chan	B	C
7, Hoo Min Wan	B	B
8, chee yan Hoh	A	B
9, Priya A/P Subrama	C	C
12, Hyo Ryi Choo	B	C
13, Matt Crawford	B	B

| Rating	Upwards	Downwards	Unchanged
Statistics	0	0	11

4.7 OVERVIEW OF APPLICANTS

After posting job vacancies, the HR personnel would need to check on the status of the applicants for a particular job posting to gather the response. This report allows you to find out the effectiveness of your organization's hiring process.

To view the **Applicants** report, go to HR → Statistics → Applicants**.** Define other relevant criteria and click **Zoom** to view more details, or click **Graph** to generate a graph.

The options at **Layout** will display the report by the applicants' application status, gender, rating, and age. Selecting **Status** at **Layout** will allow you to generate a graph to show the number of applications in their respective statuses. This can help in maintaining the efficiency in processing job applications. Selecting **Age** at **Layout** will allow you to view the applicants' age brackets and help in determining the age brackets the vacancy attracts.

The **Group by** field allows you to group the report by **Cost center**, **Job group**, **Job activity**, **Job title**, **Month**, or **Vacancy**. For instance, grouping the report by cost centers will show the number of applications for each cost center. Grouping the report by month will indicate the popular months that applications are received.

The following report shows the age bracket of applicants based on the job activity. It can be seen that only one applicant applied for the Finance & Administration job activity.
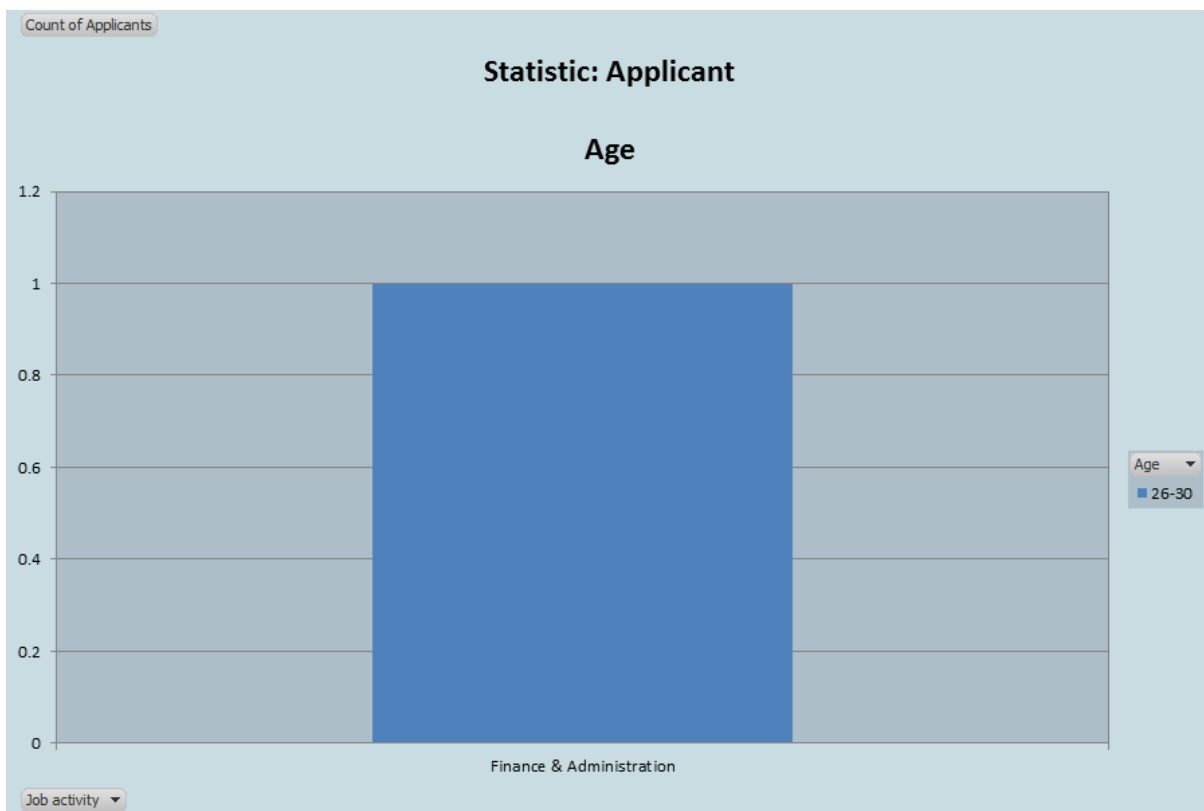
4.8 OVERVIEW OF ACTIVITY MONITOR STATISTICS

The **Activity monitor** report provides information on the activities associated with each employee. This report can be used to find out information, such as the number of sales orders an employee has created, the number of absence an employee has requested, or the number of hours an employee has worked. In this way, this report can be used to monitor the productivity of employees.

To view the **Activity monitor** report, go to HR → Statistics → Activity monitor. Define the relevant criteria and click **Refresh** to show the results. Click **Zoom** to view more details of each activity.

The **Cost center** and **to** fields will be enabled when you select the **All** check box at **Person**. This allows the results to include all the employees belonging to the specified range of cost centers.

The **Show** section lists options that are used when selecting the relevant activities to be shown in the results.

The following report shows all the possible human resource activities that were created by the selected employee. For instance, it shows that the employee had created 59 sales orders for the specified duration.

4.9   FINANCIAL REPORTS

The financial reports in human resource management are the reports that show the financial information of an organization's human resource. You can compare the budgeted and actual costing in each fiscal year and period so that you can plan better for future years. A cost analysis report will give you insights of how each cost center makes use of the allocated budget for human resource related matters, such as hiring of new employee and employee remuneration. It will also show you an expenditure performance, the productivity level of each respective job group, and the inflows and outflows of the costs planning in the organization. A pivot analysis gives you the flexibility to combine different human resource data and generate a meaningful representation of the data.

4.9.1   Budgets

A budget amount is a total sum of money allocated for a particular purpose or period of time. You can generate the budget report to get an estimated cost for any planned expenditure for a given period. In this instance, this can be payroll or allowances. This report allows you to generate the budget planning and view the summary for each fiscal year based on the respective budget scenarios. This allows you to keep track of how the organization's finances were handled especially with human resource related expenditure, such as payroll and allowances.

To view the **Budgets** report, go to HR → Reports → Budgets. Define the relevant criteria and click **Refresh**. Select a result and click **Zoom** to view more details, or click **Generate** to generate a budget.

It is mandatory to select a scenario at **Budget scenario**. It is possible that your organization may have different scenarios to handle different possible situations.

Selecting the **Not allocated** check box will disable the **Budget** and **Actual** check boxes. When this check box is selected, the results will include employees or any vacancies where budgets have not been allocated. The **Not allocated** check box will not be enabled when you select **Payroll component**, **Financial year**, **Period**, or **GL account** at **Group by**.

You can also click the **Additional criteria** button for more filters. The **Categories** section in the **Additional criteria** screen defines the categories of accounts that you want to use as filters. Categories are used to organize an organization's account better. You can create an account category at System → Finance → Journals, select an appropriate journal and click **Open**. Click ⌕ at **Account number**. In the **General ledger accounts** screen, select an account, and then click **Open**. In the **Reporting Group** section of the **Maintain accounts** screen, click ⌕ to select a category. The **Categories** screen will be displayed. Create a category by clicking **New**.

Click the **GL account** button to filter the report to include only the selected accounts. The **GL account** button is not enabled if the **Not allocated** check box is selected. General ledger (GL) accounts are defined at System → Finance → Journals. Select an appropriate journal and click **Open**. Then, select **Account number**.

Click **Components** to filter the report to include only the selected payroll components. The **Components** button is not enabled if the **Not allocated** check box is selected. Payroll components are defined in Payroll → Components → Maintain. These are items that are related to a calculation of an employee's monthly remuneration including basic pay, allowances, and contributions to governmental bodies.

The following example shows the budgetary performance according to cost centers. It also includes the FTE utilized for each cost center under the **Person: FTE** column. The **Person: Count** column next to it indicates the total number of employees who contribute to the FTE. The **Vacancy: FTE** column and its corresponding **Vacancy: Count** column show the available FTE from any vacancy created in the cost center.

In the following example, it can be seen that cost center ALG MAN, General Admin, initially budgeted human resource expenses at EUR 7,139.52 as shown in the **Budget** column. However, the actual amount used is EUR 12,488.31 as shown in the **Actual** column. The difference between the **Budget** and **Actual** columns is shown in the **Variance** column. The negative figure means the actual figure is more than the budgeted. The **Variance %** column shows the difference between the budgeted and actual figures over the budgeted figure in percentage.

The total of the organization's budget and variances are shown at the bottom of the screen.

| / | H | A | B | HR > Reports > Budgets > |

	Budget scenario	MRP			☑ Budget	☑ Actual	☐ Not allocated
	Financial year	2011 ▼					
	Period	0	to	0	☑ All		

| | Group by | Cost centre ▼ | Additional criteria | GL account | --All-- | 🚚 Components | --All-- |

Cost centre	Description	Person: FTE	Person: Count	Vacancy: FTE	Vacancy: Count	Budget (EUR)	Actual (EUR)	Variance (EUR)	Va
ALG MAN		24.00	24	0.00	0	7,139.52	12,488.31	-5,348.79	
FIN ADM		13.20	18	0.00	0	112.20	12,429.12	-12,316.92	
LOGIST		27.00	27	0.00	0	243.12	8,315.60	-8,072.48	
MARKT		12.00	12	0.00	0	87.24	21.81	65.43	
PROD		2.00	2	0.00	0	0.00	-22.90	22.90	
SERVICE		25.00	25	0.00	0	10,781.60	5,333.70	5,447.90	
VERKOOP		24.00	24	0.00	0	2,976.06	-159,430.00	162,406.06	

Total

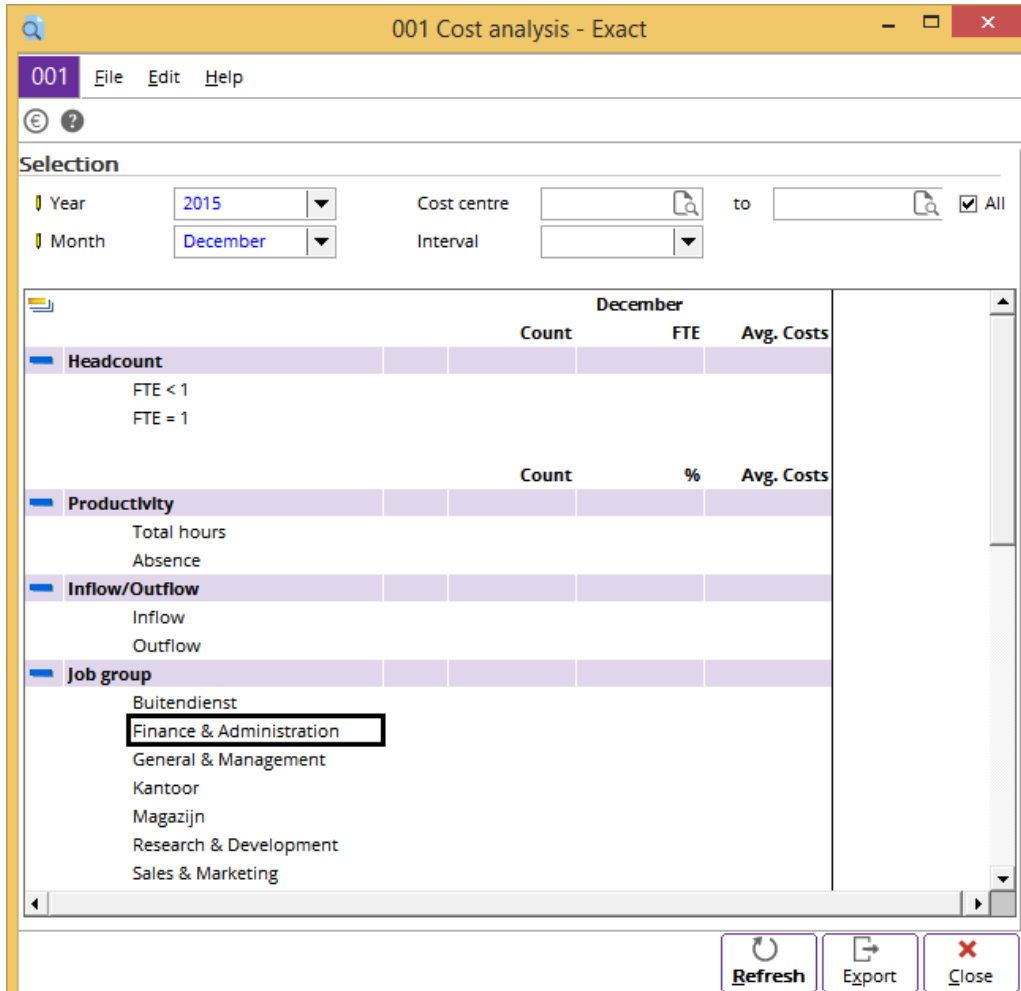| Budget | 21,339.74 | Variance | 142,204.10 | |
| Actual | -120,864.36 | Variance % | 666.38 | % |

Refresh   Zoom   Export   Generate   Close

4.9.2 Cost analysis

The **Cost analysis** report provides you with more information about your organization's manpower. It provides the relevant human resource indicators, which are numbers that can be used to further analyze the status of the talent pools as well as several (social) aspect of the internal organization. It can also be used when making human resource and social responsibility decisions taking into account other business economic drivers.

To view the **Cost analysis** report, go to HR → Statistics → Cost analysis. Define the relevant criteria and click **Refresh.**

In the following screen, select the required option at **Interval** to display the cost analysis report for a 12-month period by quarters or half-yearly.

- **Headcount** — This section shows the number of available FTEs and the associated costs for that month.
- **Productivity** — This section shows the available number of hours and the associated costs as well as the levels of absence.
- **Inflow/Outflow** — This section shows the number of employees who joined or left the organization and the associated costs.
- **Job Group**, **Gender**, **Marital status**, **Age**, and **Years of service** — These sections show the number of employees who corresponds to each section, the percentage of employees for each section compared to the total, and the associated average costs.

4.9.3 Pivot analysis

A pivot analysis is an interactive analysis summary, which enables you to effectively visualize the actual human resource information. You can present the data in the exact way you want with several options for grouping and specifying the requested criteria. In addition to visualizing the data of a single administration, this report also allows you to compare the human resource aspects between different administrations. Based on these comparisons, you can generate an analysis report according to the criteria defined.

To generate the pivot analysis:

1. Go to HR → Reports → Pivot analysis.
2. Click **Display: Fields** to select the required field(s) to be added to **Axis-X**, **Axis-Y**, and/or **Filter**.
3. Select a field and click **To : X** (to move the field to **Axis-X**), **To : Y** (to move the field to **Axis-Y**), or **To: Filter** (to move the field to the **Filter** section). You can add as many fields as necessary. To remove the selected fields, click to select the relevant field on **Axis-X** or **Axis-Y**, then click ✖ **Remove** located at the right of **Axis- X** or the bottom of **Axis-Y**.
4. Click **Columns** to display the **Format columns** box. You can choose to view the pivot analysis by **Person** or **Payroll**. Viewing the report by **Person** will show the results in **Headcount** and/or **FTE**. This depends on the option that you choose. Viewing the report by **Payroll** will show the results as salary amounts.
5. In the **Filter** section at **Date**, type the date of the pivot analysis report that you want to view. Define other relevant criteria you want to include in the pivot analysis report, and then click **Refresh**. The details that match the defined criteria will be displayed.
6. If required, you can select an employee and click **Details** to view more information. If the format of your report is **Person**, you will be able to see more information about the employee. If the format of your report is **Payroll**, you will be able to see more information about the salary components and the amount associated with each component. You can also send the selected data to Microsoft Excel by clicking **Export**. Then, click **Close** to return to the report.
7. Click **Close** to exit.

> Note:
> The previous example was derived by clicking **Columns** and selecting the **Person** layout view. The selected fields for **Axis-Y** are **Full name**, **Person**, **Job title**, and **Status**, while **Axis-X** is **Month**.

4.10 ABSENCE

Absence is when an employee is not working on a particular day. Therefore, it is always vital to keep track of the absence reports for each respective employee. From the reports, you will be able to see the absenteeism over the total number of working days for a particular employee in the fiscal year. Knowing the absenteeism trends of your organization's employees allows you to prepare and plan for your tasks better. It also allows you to view the productivity of your organization. You may even devise a motivational scheme using the absenteeism trends as a base to keep absenteeism rate to a minimum.

The following topics are relevant to this section:

- Absence overview
- Absence statistics

4.10.1 Absence overview

The **Absence** report allows you to view all the absenteeism in your organization. Depending on your requirements, you can view it in a relevant format, such as by date or cost center. For instance, you can view the date periods when most people are on leave or which cost center takes the most leave. If the statistics provide a result that is out of the ordinary, you can take action to find out the cause and remedy the situation.

To view the **Absence** report, go to HR → Overviews → Absence. Define the relevant criteria and click **Refresh**. Select a result and click **Zoom** to view more details. Then, clicking **Absence** for a selected result will bring up the **Absence card** of that employee. This absence card shows detailed absence information viewed by month or year.

The **Layout** criterion provides different results and can be used differently. At **Layout**, you can select the report to be viewed either by the **List**, **Period**, **No absences**, **Balance**, **Frequency**, or **Availability** format.

The **List** layout shows the details of absenteeism depending on the **Group by** criteria. The **Period** layout shows absenteeism according to the months they were taken. **The No absences** layout shows employees who did not take any leave. The **Balance** layout shows the leave available. If grouped by **Person**, you can also see the entitled days of leave, days of leave taken, and days of leave left for each employee and each type of leave. The **Frequency** layout shows the number of times and total number of hours that the employees have been absent. The **Availability** layout shows the total number of contracted working days and the actual number of days worked. It also shows the percentage of presence by comparing the actual days worked and the contracted working days.

The following report displays the absence information for the previous year. The results are grouped by cost center. The **Day** column shows the number of days the employees are absent from that cost center. The **Hour** column shows the total amount of hours the employees are absent for that cost center. The **Absence %** and **Availability %** are the absence and availability of the employees in each cost center calculated in percentages. It can be said that the higher the availability percentage is, the higher the productivity is for that cost center.

4.10.2 Absence statistics

The **Absence statistics** report compiles the absence or availability of each employee for a complete year. You can use this report to review and evaluate the attendance of employees in your organization. This also can be used as a control measure in looking out for employees who are absent for lengthy periods of time.

To view the **Absence statistics** report, go to HR → Statistics → Absence → Statistics. Define the relevant criteria and click **Start**.

In the **Selection** section at **Statistics**, you can choose to view the statistic report by **Absence** or **Availability**. Displaying the report by **Absence** will show the number of days an employee has been absent in a year while displaying by **Availability** will show the number of days an employee is contracted to work in a year and the actual number of days worked. **Year** must be filled in to generate the report.

The following report displays the absenteeism statistics for the employees that are away or absent from the office. The report is grouped based on cost center. The **Days(Absent)** column shows the number of absent days for each employee. If the figure is not a round figure, it means that the employee was absent for less than one full working day.

The **Working day** column shows the total number of working days that the employee is contracted for.

The percentage of absence for an employee is measured based on the total number of absence over the total working days in the selected fiscal year. This is shown in the **Absence(%)** column.

The average absence percentage by cost center is derived from having the total percentage of that cost center divided by the total number of employees.

001	Moonkite Media				
	Absence				

Cost center	All			Year	2012
Person	All				
Absence types	All				

Cost center	Person	....	Days(Absent)	Working day	Absence(%)
Standaard kostenplaats	2 Jenny A.Marrianne		4.00	217.00	1.84
	12 Hyo Ryi Choo		7.00	216.00	3.24
Average : Standaard kostenplaats					**0.46**
Average					**0.46**

APPENDIX A: PRODUCT UPDATE CHANGES

Product Update	Chapter
411	All chapters (screens changed)
404	All chapters